

A STUDY ON
DEVELOPMENT OF TOURISM IN SELECTED
MUSLIM COUNTRIES: LESSONS FOR
BANGLADESH

DOCTOR OF PHILOSOPHY IN MARKETING

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DEPARTMENT OF MARKETING

FACULTY OF BUSINESS STUDIES

UNIVERSITY OF DHAKA

BANGLADESH

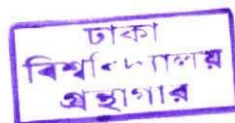
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*Submitted in completion of the requirements for the Degree of
Doctor of Philosophy in the Department of Marketing at Dhaka
University, Bangladesh*

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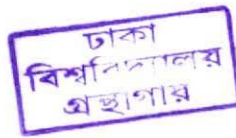
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A STUDY ON DEVELOPMENT OF TOURISM IN SELECTED MUSLIM COUNTRIES: LESSONS FOR BANGLADESH

This thesis by Abu Naser Ahmed Ishtiaque is accepted in its present form by the Department of Marketing as satisfying the thesis requirements for the degree of Doctor of Philosophy.

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I would like to proclaim that the work presented in this thesis is original and has not been submitted by me to any University or Institution for the award of any degree or diploma.



Abu Naser Ahmed Ishtiaque
April, 2010

**A STUDY ON DEVELOPMENT OF TOURISM IN
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LESSONS FOR BANGLADESH**

*Dedicated for my dearly loved parents and
Mr. M. A. Halim Gaznavi.*

A STUDY ON DEVELOPMENT OF TOURISM IN SELECTED MUSLIM COUNTRIES: LESSONS FOR BANGLADESH

I would like to express my gratitude to my research supervisors *Professor Dr. Haripada Bhattacharjee* and *Professor Dr. Md. Ashraful Islam Chowdhury* for their help, guidance and patience. In addition, I would like to express thanks to my *colleagues, friends, local and foreign officials* and last, but not the least, *my family members* for their services, emotional supports and encouragements while I was straggling to finish my study.



Abu Naser Ahmed Ishtiaque
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Preface

Tourism has been a considerable issue in the development of a country since the mid of nineteenth century. To harvest the full opportunity from this industry, many of the destination countries have marched forward by this time. Bangladesh is lagging far behind from this though the country has massive potentiality to develop tourism industry. The current study analyzes the situation of Bangladesh tourism and the tourism experiences of Malaysia, Indonesia, Maldives, Azerbaijan, Turkey, Northern Cyprus, and Niger in view of the tourism policies, relevant programs, marketing strategies, and other important issues that underline the lessons Bangladesh can take from the experiences of those countries. Experiences do suggest that the coordination and partnership among different authorities, well managed policies and practices, attainable vision and relevant marketing programs, proper educations and trainings, effective and efficient management systems, and overall government patronizations and involvements etc. are the key factors for tourism development in Bangladesh. However, the implication of this study is to broaden the government, related agencies, and peoples' mindset for emerging the industry as an attractive tourist destination in the world.

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Glossary of Acronyms and Abbreviations

AARP	American Association of Retired Persons
ABTA	Association of British Travel Agents
AD	Anno Domini
ADB	Asian Development Bank
ADS	Approved Destination Status
AIA	Ataturk International Airport
AMTA	Agency for Coordinating Mekong Tourism Activities
ANAI	Abu Naser Ahmed Ishtiaque
ASEAN	Association of Southeast Asian Nations
ASR	Annual Statistical Report
ATA	Air Transport Association
ATAB	Association of Travel Agents of Bangladesh
ATM	Arabian Travel Market
ATN	Azerbaijan Tourism Newspaper
AZAL	Azerbaijan Airlines
B & B	Bed and Breakfast
BBA	Bachelor of Business Administration
BBC	British Broadcasting Corporation
BBS	Bangladesh Bureau of Statistics
BC	Before Christ
BD	Bangladesh
BDT	Bangladesh Taka
BI	Bank Indonesia
BIMST-EC	Bangladesh, India, Myanmar, Sri Lanka, and Thailand Economic Cooperation
BIMSTEC	Bay of Bengal Initiative for Multi-Sector Technical and Economic Cooperation

BIST-EC	Bangladesh, India, Sri Lanka, and Thailand Economic Cooperation
BIT	Borsa International Tourism
BITE	Bahrain International Travel Expo
BITE	Beijing International Tourism Expo
BPC	Bangladesh Parjaton Corporation
BSCAA	Bureau of South and Central Asian Affairs
BSEC	Black Sea Economic Cooperation organization
BSP	Billing and Settlement Plan
BSS	Bangladesh Sangbad Sangstha
BTTF	Travel and Tourism Fair
CCT	City of Cape Town
CEO	Chief Executive Officer
CESD	Center on Ecotourism and Sustainable Development
CIA	Central Intelligence Agency
CITM	China International Travel Mart
CLN	Council of the League of Nations
CMP	Conservation Management Plan
CNBC	Consumer News and Business Channel
CNN	Cable News Network
COTTM	China Outbound Travel and Tourism Market
CPD	Center for Policy Dialogue
CRS	Computer Reservation Systems
CSIRD	Centre for Studies in International Relations and Development
CT	Caribbean Tourism
CTA	Cyprus Turkish Airlines
CTS	China Tourism Statistics
CWBMP	Coastal and Wetland Biodiversity Management Project
CZM	Coastal Zone Management
DFS	Duty Free Shops

DIS	Destination Information Systems
DMO	Regional and Local Destination Marketing Organization
DPO	Devlet Planlama Orgutu
DTM	Dhaka Travel Mart
EAEPE	European Association for Evolutionary Political Economy
ECA	Ecologically Critical Area
EEC	European Economic Community,
EFS	Ecotourism Fact Sheet
EMITT	East Mediterranean International Travel and Tourism
ENAT	European Network for Accessible Tourism
ESCAP	United Nations Economic and Social Commission for Asia and the Pacific
ETZ	Exclusive Tourist Zones
F&B	Food and Beverage
FBCCI	Federation of Bangladesh Chamber of Commerce and Industries
FFYDP	First Five Year Development Plan
GATS	General Agreement on Trade in Services
GDP	Gross Domestic Product
HRD	Human Resource Development
IAAPA	International Association of Amusement Parks and Attractions
IAPA	International Airline Passenger Association
IASET	International Association of Scientific Experts in Tourism
IATA	International Air Transport Association
IBRD	International Bank for Reconstruction and Development
ICCI	Islamic Chamber of Commerce and Industry
ICOTT	International Congress of Official Tourist Traffic Associations
ICT	Information and Communication Technologies
ICTL	International Colloquium on Tourism and Leisure
IDB	Islamic Development Bank
IMF	International Monetary Fund

INS	National Institute of Statistics
IRCICA	Research Centre for Islamic History, Art, and Culture
ISBN	International Standard Book Number
ISCEA	International Standard Classification of Economic Activities
ISESCO	Islamic Educational, Scientific and Cultural Organization
ITB	International Tourism Business
ITB	International Travel Bourse
ITC	Islamic Tourism Center
IUOTO	International Union of Official Travel Organizations
IUOTPO	International Union of Official Tourist Propaganda Organizations
IUOTPO	International Union of Official Tourist Publicity Organizations
JATA	Japan Association of Travel Agents
JICA	Japan International Cooperation Agency
JOCV	Japan Oversea Cooperation Volunteers
KIF	Kuwait International Fair
KL	Kuala Lumpur
KLIA	Kuala Lumpur International Airport
KLS	Kuala Lumpur Sentral
KSA	Kingdom of Saudi Arabia
LDC	Least Developed Country
LGBT	Lesbian, Gay, Bisexual, and Transgender
MAB	Malaysia Airports Berthed
MATTA	Malaysian Association of Tour and Travel Agents
MBA	Master of Business Administration
MCT	Ministry of Culture and Tourism
MEF	Ministry of Economy and Finance
MITF	Moscow International Travel Fair
MoCAT	Ministry of Civil Aviation and Tourism
MOCAT	Monthly Catalog of United States Government Publications

MOU	Memorandum of understanding
MSNBC	Microsoft National Broadcasting Company
MTA	Maldives Tourism Act
MTPB	Malaysia Tourism Promotion Board
NBN	NepalBizNews
NERP	National Economic Recovery Plan
NGO	Non Government Organization
NHTTI	National Hotel and Tourism Training Institute
NTC	National Tourism Council
NTO	National Tourism Organization
ODI	Overseas Development Institute
OECD	Organization for Economic Co-operation and Development
OIC	Organization of the Islamic Conference
OTM	Outbound Travel Mart
OTTM	Outbound Travel and Tourism Market
PAL	Philippine Air Lines
PATA	Pacific Asia Travel Association
PhD	Doctor of Philosophy
QORF	Queensland Outdoor Recreation Federation
RETOSA	Regional Tourism Organization for Southern Africa
RTA	Regional Trade Arrangement/Agreement
SAARC	South Asian Association of Regional Cooperation
SAGQ	South Asia Growth Quadrangle
SARD	Sustainable Agriculture and Rural Development
SARS	Severe Acute Respiratory Syndrome
SASEC	South Asian Sub regional Economic Cooperation
SATTE	South Asian Tourism and Travel Exhibition
SESRIC	Statistical Economic and Social Research and Training Center for Islamic Countries

SFYDP	Second Five Year Development Plan
SIT	Special Interest Tourism
SPO	State Planning Organization
SPTO	South Pacific Tourism Organization
T&T	Travel and Tourism
TA	Tourism Australia
TBC	The Bangladesh Chanel
TC	Technical Committee
TCD	The China Daily
TE	The Economist
TEAM	Tourism Employees Association of Maldives
TFYDP	Third Five Year Development Plan
THBL	The Hindu Business Line
TIC	Tourist Information Center
TIES	The International Ecotourism Society
TNN	The New Nation
TNSW	Tourism New South Wales
TOAB	Tour Operators Association of Bangladesh
TQM	Total Quality Management
TRNC	Turkish Republic of Northern Cyprus
TSA	Transportation Security Administration
TTF	The Travel Foundation
TTF	Travel and Tourism Fair
TTG	Travel Trade Gazette
TTIA	Turkish Tourism Investors Association
TTM	Travel and Tourism Mart
TUREB	Tourist Guides' Association
TÜROB	Touristic Hotels and Investors Association
TUOFED	Turkish Hotels Federation

TÜRSAB	Turkish Association of Travel Agencies
TYD	Turkish Tourism Investors' Association
UAE	United Arab Emirates
UCB	US Census Bureau
UK	United Kingdom
UN	United Nations
UNB	United News of Bangladesh
UNCITT	United Nations Conference on International Travel and Tourism
UNCTAD	United Nations Conference on Trade and Development
UNDP	United Nations Development Program
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNS	United Nations Secretariat
UNWTO	United Nations World Tourism Organization
US\$	United States Dollar
USA	United States of America
VAT	Value Added Tax
VMY	Visit Malaysia Year
VRF	Visiting Relatives and Friends
WCT	World Conference on Tourism
WTG	World Travel Guide
WTM	World Travel Market
WTO	World Tourism Organization
WTTC	World Travel and Tourism Council
WWF	World Wide Fund

Summary

This paper examines the development of tourism in a few selected Muslim countries some of which were at the similar state even a couple of decades ago as to the present state of Bangladesh tourism.

This study presents an analysis of the challenges and resolutions of those in developing tourism in the Muslim countries such as Malaysia, Indonesia, Maldives, Azerbaijan, Turkey, Northern Cyprus, and Niger that might be useful for developing tourism in Bangladesh. The findings of this study may help the planners and related stakeholders in developing appropriate policies for the tourism sector in Bangladesh.

In this study, some observations have been made regarding the relationships and conflicts between religious practices and state policies. The authorities in Bangladesh, where Islam is central to everyday's life among the dominant Bangladeshi Muslims, have responded differently to resolving this dilemma. That is why different strategic plan at national and international levels of selected countries have been discussed for developing governmental policies for Bangladesh.

The findings of the study have been presented in six chapters as follows. Introductory issues are discussed in chapter one, chapter two gives the theoretical underpinnings of the study and chapter three reviews the experiences of tourism in the selected Muslim countries along with the descriptions of tourism around the world and in OIC countries. Then chapter four explores the tourism sector in Bangladesh and chapter five focuses on the lessons Bangladesh can take from the experiences of the selected Muslim countries to boost up this sector. Finally chapter six draws the conclusion along with the conclusive pointers. The summary of these chapters follow.

Chapter one. This chapter includes a general overview of tourism industry, research problem definition, justification of selecting the study area along with the methodology used in conducting the study, and some pitfalls, as every research outcome may face, have been described to create a practical, comprehensive, reader-friendly and complimentary vision about tourism with special emphasis on the tourism development process in Bangladesh.

Chapter two. Tourism has been theoretically positioned in this chapter within the framework of dominant relevant definitions and development theories as a vehicle for international economic and social development.

Chapter three. Various factors that influenced in the development of tourism industry of Malaysia, Indonesia, Maldives, Azerbaijan, Turkey, North Cyprus, and Niger have been examined particularly in the branch of tourism product, travel in and around, tourists' trends, tourist arrivals and tourism receipts, human resources and employments, image building, and governmental policies and plans, etc. In addition, global scenarios of tourism considering the market trends in the new millennium and the role and status of Islamic (OIC) countries in international tourism along with the declaration of the seminar on the development of tourism in the Muslim countries have also been explored. It has been found that the proper policies, public and private partnerships, long-term visions, coordination among the role players and concerned authorities, necessary skills, effective marketing plan, and education are the key factors to make the industry successful.

Chapter four. Since the past few years, Government of Bangladesh has undertaken various measures to promote tourism but its' benefits have not attained the maximum. Bangladesh tourism industry nevertheless faces big challenge including the subjects of image, strategy, product development, education, cooperation, infrastructure, management, marketing and sustainable development. However, this chapter has

described the Bangladesh tourism industry in view of key products, accesses, explores, arrivals and revenues, trends, role of national and private organizations, employment issues, regional cooperation, tourism vision, branding, policies and plans, challenges and prospects. An exploration of these factors shows the important change on both the supply side and the demand side of tourism in the country. It has been found that the tourism industry is aware of the challenges it faces. However, there are a number of constraints that may impact on how these challenges can be met.

Chapter five. The foremost thrust of this chapter has concentrated on the issues relevant to the development of tourism. Numerous experiences from certain selected Muslim countries have been considered to formulate the strategies for developing tourism industry in Bangladesh. An examination of these experiences shows that the stakeholders' partnership, sound policies and practices, achievable strategies and relevant marketing programs, proper educations, effective trainings, efficient managements, overall government patronizations and involvements, and the like are the important factors for the development of tourism in Bangladesh. It has been found that the innovative strategies could be formulated by destination managers and tourism operators to avoid strategic drift for their organizations and to develop tourism in a sustainable way.

Chapter six. Finally, a development program for tourism has been suggested in the vein of adoption of appropriate strategies, practice of Total Quality Management (TQM), ensuring coordination among different agencies (such as Bangladesh missions abroad, immigration, civil aviation and tourism, security concerned agencies etc.), encouraging private sector participation through different forms of incentives, identifying and exploiting new tourist attractions, and so on. However, the implication of this study is that if government, related agencies, and peoples' mindset are broadened, then Bangladesh might appear as one of the top tourist destination countries in the world.

Chapter One

Introduction

1.1 Prelude

Tourism is the new phenomena of 21st century and the industry is booming worldwide today. Tourism industry continues to uphold its major importance due to continuing globalization which goes hand in hand with an increased demand for travelling. Gradual importance of leisure and recreation as well as open-minded attitudes of human being provide for a promising and thrilling future for tourism. The fast-changing world economy and the global political situation also create new markets for tourism industry. Tourism creates new jobs, thus lessen the unemployment problem to a great extent. This is expected to continue in wider dimensions in the days to come. Quality is one of the major concerns in tourist demand. This is why quality and sustainable tourism need proper dealings that proactively capitalize on global business challenges.

Tourism is an incredibly competitive, dynamic and constantly-changing industry. At the moment it is a thirsting as well as welcoming issue for developing countries like Bangladesh. Development of the tourism Industry has a significant impact on all of the economic, social, and physical structure of a country.

Tourism is relatively modern phenomenon (Kendell, 1988), which plays an intensely consequential role in the economic development of a country. The very concept of tourism is gaining universality day by day in human society as well as in the development of a country because it provides recreation along with good health for human body both physically and mentally. It thus it increases the standard of living of people.

Tourism is multidisciplinary subject (BPC, 1983). Various nation-building agencies pour their resources and combine hands in making it a success. Millions of people are travelling every year from one part to another part of the world to know the unknown and to see the unseen (Quddus, 1998). Thus, tourism as we know it today grew to international importance and, as a mass-market pursuit, now has a major impact on the

lives of everybody (Kendell, 1988). In the past fifty years, tourism— the basic components of a booming service sector, has been a potent factor of economic development in the countries of Europe and North America with a long industrial tradition. The developing countries of Asia, the Middle East, Africa and Latin America have, in their turn, reaped the benefits: they have discovered that wherever tourism advances, poverty diminishes (Frangialli, 2001).

A number of dramatic environmental movements occurred in the eighties and mid-eighties which moved the *tourism industry* much closer to the characteristics of the new economy (Weiermair, 2001). Consideration of the demand side suggests that the undifferentiated conservative and economizing mass customer (tourist) gave way to a much more traveled, experienced and quality conscious individualist as tourist; *mass tourism* seemed to have been replaced by the *individualized mass* (Poon, 1993; Opaschowski, 1993; Weiermair and Peters, 2000). The new tourist who is used to more convenience, faster service and more options from his or her every-day-life, also insisted on more options, more entertainment and fun, more diversified sports facilities, and cultural variety in his or her trip and vacation (Weiermair and Fuchs, 2000). Thus the tourism industry and tourism enterprises feel increasing pressures to develop new products, services, and experiences.

Tourism businesses operating at a global level, very quickly began penetrating formerly fragmented and local tourism markets. Where the latter had become globalized— such as was the case with hotel accommodation and fast food, car rentals, certain leisure products and entertainment (international films), etc. Having no other advantages other than the local competitive advantages (Dunning, 1988), and more so competitive disadvantages vis-à-vis the international or transnational tourism enterprise, pressure mounted in many, notably European, regional and local tourist destinations to restructure, reengineer and/or redesign "*hard-, soft-, and human ware*" within the core and peripheral tourism businesses. This process, which is still ongoing, involved and

benefited from a new set of factors of production and enlarged and better integrated clusters of tourism-related businesses and industries (Weiermair, 2001).

The new information and communication technologies (ICT) precedes all the newly available factors of production, often even specifically designed for the tourism industry such as computer reservation systems (CRS) or destination information systems (DIS), tourism websites on the internet or computer assisted backup systems for complex vacation or business travel packages. Human resources in tourism become much more human capital intensive and now considered by enlightened management and tourism entrepreneurs as an asset rather than a cost item (Tschurtschenthaler, 1998). Consequently, there has been a spectacular change in the schooling and training of the tourism work force (Weiermair and Fuchs, 1997; Bieger, 1998). Steadily, the industry also experiences the emergence of a new type of entrepreneur who is less operation- and more strategy-oriented, assumes calculated risks, is on average better trained and/or experienced, more oriented towards problem-solving and assumes more up-to-date styles of stewardship (Weiermair and Wöhler, 1998; Hinterhuber and Krauthammer, 1997).

Climate and location, while still remaining key factors of production for tourism products/services, share their significance with other man-made factors viz. design features, entertainment content or virtual options of tourism structures and supra-structures (Pine & Gilmore, 1999; Wolf, 1999; Weiermair and Peters, 2000). The latter, supplied or otherwise connected through diagonally integrated non tourism firms and industries¹ become more important branches of economy (Weiermair, 2001).

The tops of the highest mountains, the depths of the oceans and the ends of the earth are predicted to be the trendiest destinations for holidaymakers in this new millennium (Akteruzzaman and Ishtiaque, 2001). In association of these predictions unexplored

¹ such as financial services, architecture, design, real estate development, sports, culture and entertainment, health care and education, food processing, beverage, agriculture, and many more.

natural beauties, Bangladesh has great potentials to be most sought after tourist destination (Siddiqi, 1999). Bangladesh is a gift of nature. Its enchanting panorama and diverse culture have attracted and lured people from far flung areas of the world to visit this wonderful through ages (Diganta, 1997), had an enviable position in the entire region and was then known as the legendary land of affluence and prosperity.

Moreover, national characters and national amenities are the basic raw materials of tourism. These include scenic and natural resources, historic relics, arts and crafts, language and culture generally (O'Driscoll, 1988). To keep these facts in mind, it is clearly specified that Bangladesh have a tremendous scope to be a popular site for tourism as a product. However, all aspects of tourism— beach, cultural, village and eco-tourism will be combined to make tourism products of Bangladesh attractive (TBM, 2000) both for the domestic and international tourist and a proper plan including marketing strategy and image building program— as practical and realistic can develop a successful long-range tourism plant in the country.

Tourists arriving in Bangladesh have been swelling in numbers since 2000. Not only the international visitors but locals are also taking their holidays— travelling within the country and visiting places like *Cox' Bazaar*, *Teknaf*, *the Sundarbans*, *Kuakata*, *Paharpur*, and *Tetulia* etc. These entire individual travelers requirement for appropriate accommodations and meals are now being met for individual taste and budget. Many of the visitors are expatriate Bangladeshi coming to Bangladesh to visit their families, alongside for a holiday and to experience the vibrant and culturally rich country of their forbearers. Catering for all these people has seen an increase in the demand for new hotels and restaurants in the capital city and other tourist locations.

Accordingly, the foremost thrust of this study has concentrated on the issues relevant to the development of tourism industry in Bangladesh. The present study aims to create a practical, comprehensive, reader-friendly, and complimentary vision about tourism with

special emphasis on the development process in Bangladesh getting the experiences of the Muslim world in particular. Such type of research is inadequate in business literature of Bangladesh. Expectantly the study wishes to fill this gap.

1.2 Problem Definition

Today, tourism has become the largest industry and trade sector in the world (Conrad, and Barreto, 2005). It is generating massive employment opportunities and enabling the destination countries to earn substantial amount of foreign exchange. It has created versatile impact on people's knowledge, satisfaction, living standard, and culture of both the host and generating countries. Tourism in Asia is growing faster than anywhere else in the world, driven by the increasing wealth of countries like Taiwan, South Korea, and Malaysia, and by the huge populations of China, India, and Indonesia– the first, second, and fourth biggest countries (in terms of population) in the world (Cochrane, 2007).

Many of the destination countries, especially few Muslim countries have marched forward to pick the full potentials of this industry. But, Bangladesh is lagging far behind with respect to the growth and development of its tourism industry, though the country has massive potentiality to develop tourism industry– possesses many rare attractions noticeably different from those of many other destination countries. Nevertheless, its tourism industry is still at the primal stage and has not taken the exact form of an industry.

The government of Bangladesh has already taken several commendable initiatives for the development of tourism industry. However, many of those are of very primary in nature and have created little impact on the growth and development of this industry. Therefore, it is crucial to find out the causes of the regress of this industry and discover the bottlenecks of the present policy measures and thus suggest effective courses of actions to be undertaken by the state and other concerned authorities to harvest the full

opportunities from this industry. Policy implications are outlined based on the experiences of selected Muslim countries those were similar to Bangladesh a few decades back in terms of their state of tourism developments.

1.3 Literature Review

The literature on tourism has become a focal theme in social and business research in recent years. Most of the researches in this area have centered on defining the role of relevant and concerned organizations and destinations as well as its growth and their contributions to the economy, society, and the environment. In one study Azad and Chowdhury (1991) sketched out the development of tourism and economy, and its contribution to the economic development of a country like Bangladesh. The study has also revealed the interaction between the characteristics of the destination and the tourists more significantly. Later, Hossain (2005) has undertaken an empirical study regarding the potentials of tourism development in Bangladesh. In other studies Ahmed (1986), Hasan (1988), Haq (1991), Hasan (1992), Islam (1994), Patwari (1996), Quddus (1998), Amin and Salina (2001), Ahmed and Bhuiyan (2003), Uddin and Ahmed (2005), Hossain and Naznin (2006), Mansur (2008), Islam (2008), and Khan and Karim (2008) have exposed the reviews, significances, prospects, opportunities and facilities of tourism considering the problems facing by this industry and recommended policies for taking corrective measures. In contrast, Ullah and Hasan (2008) and Hossain (1992) exhibited some important tourist attractions of the country as a member of the OIC (Organization of the Islamic Conference) states.

Talukder (1984) has given the explanation for the need of consumer motivation to improve the tourism industry in Bangladesh. Hasan (1990) discovered the behavior of the domestic tourists by showing marketing significance considering the leisure spending behavior of the people in Bangladesh.

However, a few more researches were conducted in Bangladesh in the field of tourism showing cruising scenario in the country as a forthcoming concern of the industry (Hasan, 1995), foreign tourists' attitudes (Hossain, 2002), an appraisal of foreign tourist's arrivals trend (Hasan and Neela, 2008), an analysis of foreign tourists arrivals (Islam and Islam, 2004), and the image of Bangladesh to foreign travelers and some essential curative tricks (Chowdhury, 1999; Kalam, 2001), the role of different tourism firms (Hossain et.al, 2003), development of travel agencies in the country (Baiquallah, 1983), evocative strategies (marketing) for the National Tourism Authority providing marketing tools, pitfalls and policy implications (Hossain, 2001; Islam, 2004), strategic promotion approaches to developing tourism in Bangladesh focusing role of the tour operators' performances (Hossain and Firozzaman, 2003), development of tourism business focusing on strategic issues and implications (Nahid and Islam, 2008), eco tourism (Kabir and Bhuiyan, 2004), and spiritual tourism (Azad and Akter, 2009) development in the country etc. Another important study was also described the marketing promotion strategies of tourism industry in the country (Hossain and Hossain, 2001).

The 20th century witnessed a steady increase in tourism all over the world. The levels of organization, methods of transportation, and facilities available at destination points have enjoyed an accelerated pace of improvement (Cho, 2001). Kamal and Chowdhury (1993), Islam (1998), and Abir and Nabi (2001) analyzed the significance of the transportation services, airlines in particular and its marketing systems for the development of tourism and proposed a number of implications for taking remedial actions. Haque and Ishtiaque (2000), and Kamal and Ahsan (1997) have also studied about transportation sector, roadway and railway in particular and have shown the tourists' preferences and attitudes, and determinants for selecting the other modes of transportation for journey which are very much relevant to the development of tourism. In contrast, Hasan and Chowdhury (1995) have elucidated significance of hotel and restaurant services in the development process of tourism sector in the country.

Moreover, other researchers have studied on particular issues like development of tourism at seashore and sea beach i.e. Potenga, Chittagong (Akteruzzaman and Ishtiaque, 2001) and Kuakata, Potuakhali (Ahsanullah, 1997), township tourism (historical place) like Mujibnagar, Meherpur (Azad, 2004) and Sylhet (Bhuiyan and Rahman, 2008), eco-park like Shitakuda, Chittagong (Khanam, 2004), Dhaka zoo (Malakar et.al, 2007), Jaflong, Sylhet (Hamid and Akter, 2008), and Sunderbans (Tisdell, 1997) as eco-tourism, e-tourism (Hossain, 2008; Sobhan and Dey, 2008), religious tourism viz. Hazrat Shahjalal (RA) burial ground, Sylhet (Islam et.al, 2009), and so on showing the valuations, potentialities, opportunities and challenges besides the recreation, expectation and perception of the tourists in the development of a particular site as a part of the development of tourism industry in the country.

However, a comprehensive study on tourism in Bangladesh is yet to unearthed. Similarly, enough literatures on the development of tourism industry in Bangladesh are not available since the issue is a recent phenomenon. From this perspective, it can be concluded that contribution of this study can play a significant role in fostering the development of tourism in Bangladesh.

1.4 Objectives

The objectives of the study are classified into two groups: general and specific (Malhotra, 2007).

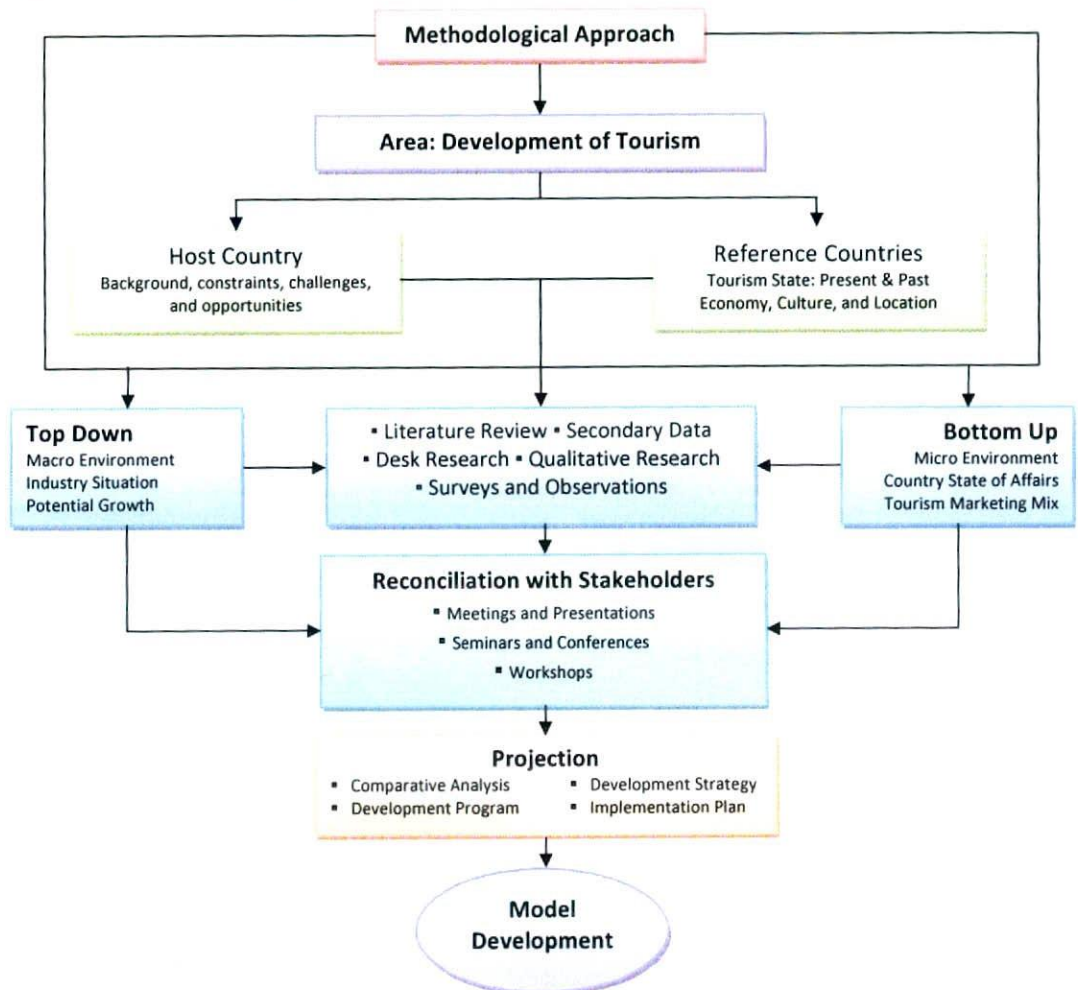
The general objective of this study is *to identify the key factors in the development of tourism that make the industry successful and recognizing as well as evaluating the impact of those factors on the development of tourism in Bangladesh*. On the other hands, to make this study more worthy, valid, and useful to concerned authorities, the researcher sets the following specific objectives:

1. to prepare a portrait of Bangladesh tourism industry considering the background, constraints, challenges, and opportunities.
2. to present the scenario of tourism industry of a number of Muslim countries.
3. to analyze the importance of tourism industry in the development of Bangladesh.
4. to gain the lessons that can be taken from the experiences of developed tourist countries in the Muslim world.
5. to develop a comprehensive model for the appropriate and sustainable development of Bangladesh tourism industry.

1.5 Methodology

The study investigates how the development of tourism in a few Muslim countries could help to develop the tourism industry in Bangladesh. Many countries of the world are now entirely or to some extent dependent on this sector especially generating huge foreign earnings. Every destination country is trying to achieve more gain by this industry. The expansion of the tourism throughout the world has increased competition among the tourist destinations, trying to attract more tourists by adopting appropriate developing strategies.

The methodology upon which the researcher undertook the study comprises of top-down and bottom-up approaches effected by literature review, secondary data analysis and desk research, and by conducting surveys. Observations and qualitative research, which after consultation with the different stakeholders, yielded a pragmatic development model preceded by undertaking comparative analysis, formulating development model and effecting an action program as in Figure: 1.1.

Figure 1.1: Methodological Approach to Tourism Development Model Formulation

Source: Developed by the Researcher for the purpose of this study.

Selection of the study area. Tourism is the most potential, dynamic, and dominant industry than any other competitive industry around the world. In fact, it is the world's leading, fastest growing, and single largest industry. Tourism as a multi-faced industry is playing pivotal role in the global as well as in the individual economic perspective for a country. In the year 1950, the international tourist arrivals were 25.3 million which rose to more than 846 million in the year 2006 corresponding to an average annual growth rate of 6.6% and in 1950, the world tourism earning was US\$ 2.1 billion and the same stood at US\$ 741.2 billion in 2006 corresponding to an average annual growth rate of

11.5% (OIC, 2006). Tourism has become a popular global leisure activity. In 2007, there were over 903 million international tourist arrivals, with a growth of 6.6% as compared to 2006. International tourist receipts were US\$ 856 billion in 2007 (UNWTO, 2008). The World Tourism Organization forecasted that in the year of 2010, the total world tourist arrivals will be 1,006.4 million and it will increase to 1,561.1 million in 2020. The figure of the same for South Asia will be 10.6 million and 18.8 million in the year of 2010 and 2020 respectively. At the same time WTO forecasted that the number of tourist arrivals in Indian Ocean destinations will be 91.544 million and 179.249 in the year 2010 and 2020 respectively and the figure of the same in Bangladesh will be 0.255 million and 0.415 million in the corresponding years (WTO, 2000). WTO also forecasted that the earnings from tourism will rise to US\$ 2 trillion a year by 2020. Many of the destination countries have marched forward to reap the full potentials of this industry. As mentioned earlier, Bangladesh is lagging far behind from this. A substantial number of works on tourism as a subject has been done throughout the world. But a relatively few works and literatures on the development of tourism in our country have been found as yet. However, the selected area of this study is ***“Development of Tourism in Selected Muslim Countries: Lessons for Bangladesh”***. In view of the fact that Bangladesh has massive potentiality to develop tourism industry with enriched indigenous culture, archaeological and historical sites, and natural scenic beauty. The country would be the main holiday destination for the festivals, archeological sites, islands, beaches, hill tracts even eco-tourism including wildlife and adventure tourism and many more. According to a government official of Bangladesh Parjatan Corporation, during the first four months of the current year (2008), the number of visitors to Bangladesh was 150 thousand, which is a new record, and it earned 2, 759.80 million US dollar. “Apart from this, the report of the WTTC stated that the contribution of this sector to employment is expected to rise from over 2,065,000 in 2008, 3.1% of total employment or one in every 32.0 jobs to 2,791,000 jobs, 3.2% of total employment or one in every 31.7 jobs by 2018” (Karim, 2008).

Nature of the study. The study is basically explorative nature because no previous study focuses of this type. A *qualitative approach* is particularly suitable for the research study (Eisenhardt, 1991). The study was undertaken using a multi-pronged strategy. Personal interviews record verifications, and a *review of literature* was undertaken to assess and document the development of tourism in a few selected Muslim countries. Same procedure was followed to have a scenario of the present state of Bangladesh tourism industry. An exploratory study aimed to gain familiarity with a phenomenon or to achieve new insights into it. By definition, an exploratory research involves investigation of problems on which little formal knowledge is available (Malhotra, 2007). Being the nature of this study an exploratory one and using descriptive statistical tools rather than inferential statistical ones, the present study is both a theoretical and to a little extent an empirical one.

Literature review and desk research. The initial phase of the methodology began with the review of relevant literature on the issues indicated under the “Top-down” and “Bottom-up” approaches as well as aspects under “Projection”, assimilation of relevant data available in the secondary sources, and then conducting a desk research.

Information needed and sources of information. The sources of data were both *secondary and to some extent primary*. It involved collection of data about the characteristics of the tourism Industry in Bangladesh and the tourism industry in different selected Muslim countries. Secondary information (Churchill and Iacobucci, 2002) was gathered from websites, seminar proceedings, newspaper articles, journals of different organizations like Bangladesh Parjaton Corporation (BPC), Association of Travel Agents of Bangladesh (ATAB), Bangladesh Bureau of Statistics (BBS), United Nations Development Program (UNDP), United Nations World Tourism Organization (UNWTO), World Travel and Tourism Council (WTTC), United Nations Educational, Scientific and Cultural Organization (UNESCO), United Nations Conference on International Travel and Tourism (UNCITT), Organization of the Islamic Conference (OIC), Islamic Tourism Center

(ITC), Islamic Educational, Scientific and Cultural Organization (ISESCO), Research Centre for Islamic History, Art and Culture (IRCICA), Statistical Economic and Social Research and Training Center for Islamic Countries (SESRIC), Centre for Studies in International Relations and Development (CSIRD), and so on. The design of collecting primary data is from different sectors of tourism industry.

Surveys, observations and qualitative research. Two primary modes, namely survey (Dillman, 2000; Jolliffe, 1986; Fowler, 1984; Glock, 1967) and observation (Carl, 1976; Buckley, 1976), were used to collect data. The bases covered include private tour operators, resort owners, hoteliers, travel agents, and ministry and tourism authority. Furthermore, a panel of experts was consulted. The experts include employees/officials engaged in Tourism industry, consultant both foreign and local, technical expert and a few common and social actionist group.

Sample design. The sample design consists of (a) defining the target population– to collect data from industry, the target population is defined to be the stakeholders of the tourism industry in Bangladesh and with regards to the comparative study, countries were selected from the Muslim world, (b) determination of sample size– a total of 55 *industry members* were selected purposively for the survey. These members in the sample included 20 *private tour operators*, 3 *resort owners*, 20 *hoteliers*, 10 *travel agents*, and concerned personnel of the *Ministry of Civil Aviation and Tourism* as well as *Bangladesh Parjatan Corporation* and in case of comparative study, 7 *countries* were selected purposively from the Muslim world of which some of the countries were at the same state of tourism even a few of decades back as the present state of Bangladesh tourism viz. *Malaysia, Indonesia, Maldives, Azerbaijan, Turkey, Turkish Republic of Northern Cyprus, and Niger*, and (c) sampling method– primary data were collected through surveys from the different stratum of experts. The survey used a standardized instrument developed by the United Nations World Tourism Organization (UNWTO).

Questionnaire preparation and pretesting. Seven sets of questionnaires were prepared including (a) private tour operators, (b) resort owners, (c) hoteliers, (d) travel agents, (e) concerned ministry, (f) tourism authority, and (g) concerned officials of the diplomatic missions of the chosen countries. After preparing the questionnaires, those were pretested personally by the researcher. The pretesting and revision of the questionnaires took place several times till the researcher was satisfied that the required data could be collected with minimum incurrent of non-sampling errors.

Fieldwork and supervision. The researcher was trained thoroughly for carrying out the surveys effectively. The training included as to how to select respondents, introduce the researcher to the respondents, ask questions, provide reinforcements to the respondents, record the responses etc. Two supervisors supervised the fieldwork. They monitored the activities of the researchers very closely, provided him support and motivation, and in some cases, took part in the field investigation.

Finally, the overall scenario of the tourism sector of Bangladesh, including financing, pricing marketing, arrivals, length of stay, employment created, revenue earned, contribution to GDP (Gross Domestic Product), and growth over the last few decades and other relevant issues were also assessed. However, a comparison between Bangladesh's pictures with the selected Muslim countries in terms of the above was little understood. A critical analysis on those countries' tourism policies, programs, and marketing strategies were made to determine the lessons Bangladesh could learn from their experiences to boost its tourism sector. And this is the modest attempt of this dissertation.

1.6 Limitations

The present study has some limitations. The foremost limitations are: **(a)** samples selection– the researcher believes that it would be better and representative if the sample size (particularly selected Muslim countries) could be comparatively large enough, **(b)** dearth of literature on Bangladesh tourism– limited the researcher to develop any comprehensive insights into the problem under consideration, **(c)** unwillingness to reply certain queries by the different authorities– for this, the validity and the reliability of information collected for this study may not pose any confusion and the authenticity of the findings may not be subject to any question, **(d)** in case of the option for the selection of the studied Muslim countries, the study has been suffering from the location and market biases with regard to the samples selected, **(e)** inability to visit the selected Muslim countries to collect necessary information personally, **(f)** the assessment of contribution made by the tourism sector– no documentations and no available data have led the researcher to reflect or present a part of the total contribution to the economy of Bangladesh², **(g)** financial support– no institutional financial support was given to the researcher for conducting and publication of the research, **(h)** lack of comprehensive data/information on domestic tourism, i.e. number of people visited to different touristic attractions, their length of stay, spending patterns and so on, and **(i)** finally, time constraint has been another sphere in completing such a dynamic research work– on this ground of time constraints the findings of this study could be discounted at least to some extent.

² the foreign currency income does not reflect alone in the real income of the country from tourism sector, No concrete calculation procedure are available to evaluate the actual income from tourism sector in Bangladesh. Besides, there are some hidden expenditure of tourists and some income of different tourism firms that are not properly documented and could not be taken into account. Moreover, the income of hotels, restaurants, travel agencies, private airline, and private tour operators could not be collected and shown due to their unwillingness to provide such data. Further, all these incomes have multiplier effect on the overall economy of the country.

Chapter Two

Tourism: Theoretical Underpinnings

2.1 Concepts and Typologies

Conceptually, tourisms have many conflicting connotations but one should see reality. Tourism can be delineated as the science, art, and business of drawing attention of visitors and provide them accommodation, catering, and to meet up their all kinds of need and want courteously. Etymologically, the word tour has derived from the Latin word 'tornare' and the Greek word 'tornos'. The meanings of those two words are same and is in sane a circle. The suffix *-ism* is defined as an action or process. The combination of these two prefix and suffix is given an idea about the action of movement around a circle. Indication of early definition of tourism (William, 2002), provided by the Austrian economist Hermann Von Schullard in 1910, who defined it as the sum total of operators, mainly of an economic nature, which directly relate to the entry, stay, and movement of foreigners inside and outside a certain country, city, or a region. However, this definition of tourism failed to embrace the internal tourism. Literally, tourism means the business activity connected with providing accommodations, services, and entertainments for people who are visiting a place for a pleasure (Hornby, 2002). Pearshall and Trumble (2006) stated tourism as the organization and operation of holidays especially as a commercial enterprise. In fact, tourism is the practice of travelling for pleasure and the business of providing tours and services for tourist (William, 1982).

Because of conflicting definition, it is extremely difficult to define precisely the words tourist and tourism (Theobald, 2005). Makens and Choy (1997) were given much attention from an academic and a practical perspective to set a standard definition as a basic requirement in order to establish parameter for research content and also were stated that *without standard definitions, there can be no agreement on the measurement of tourism as an economic activity* or its impact on the local, state, national or the world economy.

The Council of the League of Nations took the first step towards the development of international definitions on tourism in 1937 that recommended a definition of “*International tourist*¹” which was essential for statistical purposes. In 1950, the International Union of Official Travel Organizations (IUOTO) had slightly amended this definition at a meeting held in Dublin. Finally, the concept of “*international visitor*” was established by the United Nations Statistical Commission in 1953. Later, UN Rome Conference (1963) on International Travel and Tourism suggested IUOTO’s proposed definition of the terms “*visitor*²”, “*tourist*³” and “*excursionist*⁴”. In 1967, a United Nations expert group on international travel statistics had examined those definitions. Subsequently in 1968, the definitions were endorsed by the United Nations Statistical Commission.

Tourism is an activity which, in some form or other, mankind has undertaken since long (WTO, 1995). Recently, tourism has been recognized as an important social and economic phenomenon. As a result, the effects of tourism are increasingly being felt both at the individual level as well as on the society. Meanwhile, Leiper (1979) suggested three approaches in defining tourism: (a) economic definition⁵, (b) technical definition⁶, and (c) holistic definition⁷. Afterward, the importance of tourism and its multi-effects have been recognized in the declaration of WTO Manila Conference (1980) on World Tourism, which stated:

¹ one who visits a country other than that in which he habitually lives for a period of at least twenty-four hours.

² consists of two distinct categories of travelers: tourists and excursionist.

³ a person who travels from place to place for network reasons.

⁴ a traveler who spends less than twenty four hours at a destination.

⁵ view tourism as both business and an industry.

⁶ indentify the tourist in order to provide a common basis by which to collect data.

⁷ attempt to include the entire essence of the subject.

..... is considered an activity essential to the life of nations because of its direct effects on the social, cultural, educational and economic sectors of national societies and on their international relations (WTO Manila Conference, 1980).

To understand tourism's increasing and widening impact on societies, it is necessary to define what tourism is. This is particularly important from the statistical point in terms of measurements. The orthodox view of tourism defines it in terms of the activities of tourists/visitors or the activities of businesses supplying tourists/visitors, i.e. in either demand side terms perspective or supply side terms perspective (WTO, 1995). At the World Tourism Organization⁸ Ottawa Conference (1991) on Travel and Tourism Statistics, the demand side concept was accepted as the appropriate approach, and "tourism" was defined:

..... the activities of persons traveling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes (WTO Ottawa Conference, 1991).

The said definition acknowledges tourism as comprising a wide spectrum of activities, and goes beyond the general perception of tourism as being limited to holiday activity only.

A salient feature of the above definition is that tourism is defined in terms of the activities of a particular type of consumer, that is, in demand side terms. Tourism is frequently referred to as an "industry," and industries are traditionally defined in supply-side terms (WTO, 1995).

⁸ the World Tourism Organization is a significant global body, concerned with the collection and collation of statistical information on international tourism. This organization represents public sector tourism bodies, from most countries in the world and the publication of its data makes possible comparisons of the flow and growth of tourism on a global scale.

Industries are defined in terms of groups of business enterprises which are engaged in a common type of economic activity. Economic activities are categorized according to some classification system, such as the United Nations' International Standard Classification of Economic Activities (ISCEA). These categories identify the production or supply of a particular good or service.

Tourism cannot be identified in terms of the supply of particular goods/services. It is not the nature of a good/service which identifies an activity as tourism, but rather the circumstance of the consumer of the good/service⁹. Tourism can, in theory at least, involve the final consumption of any product. The definition of "tourism" therefore, relies on defining the type of consumer whose activity constitutes tourism, rather than the type of product consumed (WTO, 1995).

Hunziker and Krapf (1941) defined tourism as people who travel the sum of the phenomena and relationships arising from the travel and stay of non-residents, in so far as they do not lead to permanent residence and are not connected with any earning activity (Werner and Krapf, 1942).

In 1976, the Tourism Society of England defined tourism as:

..... is the temporary, short-term movement of people to destination outside the places where they normally live and work and their activities during the stay at each destination. It includes movements for all purposes (Beaver, 2005).

In 1981, the International Association of Scientific Experts in Tourism (AIES) defined tourism in terms of particular activities selected by choice and undertaken outside the home.

⁹ for example, if a person purchases a soft drink from his/her local store this transaction is clearly not "tourism"; however, if someone who is visiting that area for a holiday purchases the same soft drink in the same store the activity is "tourism".

Tourism is travel for recreational, leisure or business purposes. Perhaps the best working definition of tourism supported by Gunn (1994) is that of Matheison and Wall (1982):

..... is the temporary movement of people to destinations outside their normal places of work and residence, the activities undertaken during their stay in those destinations and the facilities created to cater to their needs (Matheison and Wall, 1982).

Tourism has become a popular global leisure activity. Goeldner and Ritchie (2006) stated that any attempt to define tourism and to describe its scope fully must consider the various groups that participate in and are affected by this industry and their perspectives– the tourist, the business providing tourist goods and services, the government of the host community or area and the host community are vital to the development of a comprehensive definition. However, they defined tourism as:

..... the process, activities and outcomes arising from the relationships and the interactions among tourists, tourism suppliers, host governments host communities and surrounding environments that are involved in the attracting and hosting of visitors (Goeldner and Ritchie, 2006).

From the above discussion the definition as well as the scope of tourism, can be summed up as: **(a)** the science, art and business of drawing attention, **(b)** the process and outcomes arising from the relationships, **(c)** an activity essential to the life of nations, **(d)** acted as the organization and operation of holidays, **(e)** the temporary short-term movement, **(f)** do not lead to permanent residence, **(g)** the travel and stay of non-residents, **(h)** stayed outside visitor's usual environment, **(i)** visited a place for a pleasure, **(j)** not more than one consecutive year, **(k)** not connected with any earning activity, **(l)** activities of the consumer, **(m)** involved in the final consumption of any product, and **(n)** gracious fulfillment of needs and wants.

The above conditions suggest that the following categories should not be regarded as tourists (Lickorish and Jenkins, 1997; Bhatia, 2006) such as: **(a)** persons arriving with or without a contract of work, to take up an occupation or engage in any business activity in the country, **(b)** persons entering or leaving a country as migrants, including dependents accompanying or joining them, **(c)** students and young persons in boarding establishment or schools, **(d)** residents in a frontier zone and persons domiciled in one country and working in an adjoining country, and **(e)** travelers passing through a country without stopping, even if the journey takes more than 24 hours. Accordingly, many countries have adopted these conditions for the compilation of travel statistics (Bhatia, 2006).

In 1994, the United Nations classified three forms of tourism: **(a)** Domestic tourism¹⁰, **(b)** Inbound tourism¹¹, and **(c)** Outbound tourism¹². The UN also derived different categories of tourism by combining these three basic forms of tourism: **(a)** Internal tourism¹³, **(b)** National tourism¹⁴, and **(c)** International tourism¹⁵. The past few decades many forms of tourism have evolved as revealed in Figure 2.1 viz.: Accessible tourism, Adventure travel, Agritourism, Archaeotourism, Birth tourism, Bookstore tourism, Christian tourism, Culinary tourism, Cultural tourism, Dark tourism, Disaster tourism, Drug tourism, Ecotourism, Extreme tourism, Female sex tourism, Garden tourism, Geotourism, Halal tourism, Heritage tourism, LGBT tourism, Literary tourism, Medical tourism, Music tourism, Nautical tourism, Neo Tourism, Pop-culture tourism, Poverty tourism, Religious tourism, Rural tourism, Sacred travel, Sex tourism, Space tourism, Sports tourism, Sustainable tourism, Township tourism, Voluntourism, Water tourism, Wine tourism, Wildlife tourism.

¹⁰ involves residents of the given country traveling only within this country.

¹¹ involving non-residents traveling in the given country.

¹² involving residents traveling in another country.

¹³ comprises domestic tourism and inbound tourism.

¹⁴ comprises domestic tourism and outbound tourism.

¹⁵ consists of inbound tourism and outbound tourism.

Figure: 2.1: Different Forms of Tourism

Accessible tourism. Accessible tourism is the ongoing endeavor to ensure tourist destinations, products and services are accessible to all people, regardless of their physical limitations, disabilities or age. *It encompasses publicly and privately owned tourist locations.* The improvements not only benefit those with permanent physical disabilities, but also parents pushing buggies, elderly travelers, people with temporary injuries, such as a broken leg, and their relatives, friends and other companions. According to the European Network for Accessible Tourism (2008), accessible tourism includes: Barrier-free destinations, Transport, High quality services, Activities, exhibits, attractions, marketing, booking systems, Web sites, and services.

Adventure travel. Adventure travel is one type of tourism, involving exploration or travel to *remote or exotic areas*, where the traveler should *"expect the unexpected"*. Adventure tourism is rapidly growing in popularity, as tourists seek different kinds of vacations.

Agritourism. Agritourism is a style of vacation that normally takes place on a farm or ranch. This may include the chance to help with farming and ranching tasks during the visit. Agritourism is considered to be a niche or uniquely adapted form of tourism and is often practiced in wine growing regions such as Australia, Italy, Portugal, Spain, and North America.

Archaeotourism. Archaeotourism or Archaeological tourism is an alternative form of *cultural tourism*, which aims to promote the passion for historical-archaeology and the conservation of historical sites.

Birth tourism. Birth tourism is the practice of travelling to countries that practice birthright citizenship to have children, thereby ensuring the child citizenship in the destination country.

Bookstore tourism. Bookstore tourism is a type of *cultural tourism* that promotes independent bookstores as a group travel destination. It started as a grassroots effort to support locally owned and operated bookshops, many of which have struggled to compete with large bookstore chains and online retailers.

Christian tourism. Christian tourism is a subcategory of *religious tourism*. It refers to the entire industry of Christian travel, tourism, and hospitality.

Culinary tourism. Culinary Tourism is the pursuit of unique and memorable eating and drinking experiences. *It focuses on healthy and organic eating, culinary/food pedigrees.*

Cultural tourism. Cultural tourism or culture tourism is the subset of tourism concerned with a country or region's culture, especially its arts. Cultural tourism includes tourism in urban areas, particularly historic or large cities and their cultural facilities such as museums and theatres.

Dark tourism. Dark tourism is the act of travel and visitation to sites, attractions and exhibitions which has real or recreated death, suffering or the seemingly macabre as a main theme (Stone, 2005). Dark tourism also called black tourism or grief tourism. This includes castles and battlefields such as Culloden near Inverness, Scotland; sites of disaster, either natural or manmade such as Ground Zero in New York; prisons now open to the public such as Beaumaris Prison in Anglesey, Wales; and purpose built centers such as the London Dungeon.

Disaster tourism. Disaster tourism refers to the *misery of the communities and families*. For example, disaster tourism took hold in the greater New Orleans area in the aftermath of Hurricane Katrina.

Source: Encyclopedia (Wikipedia) and Selected Books and Articles.

Figure: 2.1: Different Forms of Tourism (Contd.)

Drug tourism. Drug tourism is travel for the purpose of obtaining or using drugs for personal use that are unavailable or illegal in one's home jurisdiction. Drug tourism can be also defined as the phenomenon by which one's travel experience involves the consumption and usage of drugs that are considered to be illegal or illegitimate in either the visited destination or the tourist's country of origin.

Ecotourism. Ecotourism is travel to fragile, pristine, and usually protected areas that strives to be low impact and (often) small scale (Drumm et.al, 2005; Fennell, 2003). It helps educate the traveler, provides funds for conservation, directly benefits the economic development and political empowerment of local communities and fosters respect for different cultures and for human rights (Honey, 1999).

Extreme tourism. Extreme tourism or *shock tourism* is a type of niche tourism involving travel to dangerous places (mountains, jungles, deserts, caves, etc.) or participation in dangerous events.

Female sex tourism. Female sex tourism is travel by women, partially or fully for the purpose of having sex. The practice differs from male sex tourism in that women do not typically use the structures of the sex industry (e.g. strip clubs, sex shows and organized tours) to meet foreign partners. Women's trips may be referred to as "romance tourism". They typically involve sex with locals from the holiday destination country, as opposed to with other tourists, possibly from their own country (a holiday fling).

Garden tourism. Garden tourism is a type of niche tourism involving visits or travel to botanical gardens and places which are significant in the history of gardening. Garden tourists often travel individually in countries with which they are familiar but often prefer to join organized garden tours in countries where they might experience difficulties with language, travel or finding accommodation in the vicinity of the garden.

Geotourism. Geotourism is *best practice* tourism that sustains, or even enhances, the geographical character of a place, such as its culture, environment, heritage, and the well-being of its residents. The concept was introduced publicly in a 2002 report by the Travel Industry Association of America and National Geographic Traveler magazine.

Halal tourism. Halal tourism is a new product in the tourism industry. The industry provides *holiday destinations for Muslim families. The packages comply with the Sharia rules which the Muslim families abide by.* The hotels in destinations do not serve alcohol and will have separate swimming pools and spa facilities for men and women. Malaysia, Turkey and many more countries are trying to attract Muslim tourists from all over the world offering facilities in accordance with the religious beliefs of Muslim tourists.

Heritage tourism. Heritage tourism or Cultural heritage tourism is a branch of tourism oriented towards the cultural heritage of the location where tourism is occurring. Heritage tourism involves visiting historical or industrial sites that may include old canals, railways, battlegrounds, etc. (Mckercher, 2002).

LGBT tourism. Gay tourism or LGBT tourism is a form of niche tourism marketed to gay, lesbian, bisexual and transgender (LGBT) people (Greenberg, 2007). They are usually open about their sexual orientation and gender identity but may be more or less open when traveling; for instance they may be closeted at home or if they have come out, may be more discreet in areas known for violence against LGBT people (Friskopp and Silverstein, 1996; Wieder, 2004).

Source: Encyclopedia (Wikipedia) and Selected Books and Articles.

Figure 2.1: Different Forms of Tourism (Contd.)

Literary tourism. Literary tourism is a type of cultural tourism that deals with places and events from fictional texts as well as the lives of their authors. This could include following the route a fictional character charts in a novel, visiting particular settings from a story or tracking down the haunts of a novelist.

Medical tourism. Medical tourism (also called medical travel, health tourism or global healthcare) is a term initially coined by travel agencies and the mass media to describe the rapidly-growing practice of traveling across international borders to obtain health care. Such services typically include elective procedures as well as complex specialized surgeries such as joint replacement (knee/hip), cardiac surgery, dental surgery, and cosmetic surgeries.

Music tourism. Music tourism is the act of visiting a city or town, in order to see a concert or festival. Music tourism is *one of the newest typology of tourism*. Music tourism can be categorized under pleasure tourism, as it involves travel of people to watch a music concert. Rock music and hip-hop music are the two main genre of music which creates music tourism.

Nautical tourism. Nautical tourism is an increasingly popular way to combine love of sailing and boating with vacation and holiday activities. Many tourists who enjoy sailing combine water travel with other activities. Supplying the equipment and accessories for those activities has spawned businesses for those purposes (Natchez, 2007).

Neo Tourism. Neo-Tourism is a term coined by the Korea tourism organization that comprehensively describes the *newly changing trend of the tourism*. The "Neo Tourism" incorporates concepts such as 'Sustainable tourism' which puts emphasis on the environmental sustainability and 'Special Interest Tourism (SIT)' which reflects postmodernistic social phenomenon.

Pop-culture tourism. Pop-culture tourism is the act of traveling to locations featured in literature, film, music, or any other form of popular entertainment. Popular destination has included Los Angeles, California film studios.

Poverty tourism. Poverty tourism or poorism, also known as township tourism or slumming is a type of tourism, in which tourists travel to less developed places to observe people living in poverty. (Lancaster, 2007). Poorism travel tours are popular in places like Bangladesh, India, Ethiopia, and even places that have had natural disasters such as hurricanes and tsunamis. After Hurricane Katrina, Louisiana became a big poorism site.

Religious tourism. Religious tourism, also commonly referred to as faith tourism, is a form of tourism whereby people of faith travel individually or in groups for pilgrimage, missionary, or leisure (fellowship) purposes. North American religious tourists comprise an estimated \$10 billion of this industry (Jordan, 2007).

Rural tourism. Rural Tourism focuses on participating in a rural lifestyle. It can be a variant of ecotourism. Any village can be a tourist attraction, and most villagers are very hospitable across the globe. Agriculture is becoming highly mechanized and therefore requires less manual labor. This is causing economic pressure on some villages, leading to an exodus of young people to urban areas.

Sacred travel. Sacred travel, or metaphysical tourism, spiritualized travel, is a growing niche of the travel market. It attracts New Age believers, primarily middle-aged women, and involves tours and travel to "spiritual hotspots" on the Earth. Destinations are often ancient sites where there is a mystery concerning their origin or purpose, such as Machu Picchu in Peru, The Pyramids of Egypt, or Stonehenge in England.

Source: Encyclopedia (Wikipedia) and Selected Books and Articles.

Figure: 2.1: Different Forms of Tourism (Contd.)

Sex tourism. Sex tourism is travel to engage in sexual intercourse or sexual activity with prostitutes, and is typically undertaken internationally by tourists from wealthier countries. The World Tourism Organization defines sex tourism as "trips organized from within the tourism sector, or from outside this sector but using its structures and networks, with the primary purpose of effecting a commercial sexual relationship by the tourist with residents at the destination" (WTO General Assembly: Cairo, 1995).

Space tourism. Space tourism is the recent phenomenon of tourists paying for flights into space pioneered by Russia. As of 2009, orbital space tourism opportunities are limited and expensive, with only the Russian Space Agency providing transport.

Sports tourism. Sports tourism involves people traveling to participate or to observe sports. These activities may include people competing in an international event, such as the Olympics, or simply sitting amongst the audience watching the World Cup match.

Sustainable tourism. Sustainable tourism is an industry committed to making a low impact on the environment and local culture, while helping to generate income and employment for local people. The aim of sustainable tourism is to ensure that development is a positive experience for local people; tourism companies; and tourists themselves. But sustainable tourism is not 'ecotourism' (Honey, 1999).

Township tourism. Township tourism is a term used to describe a form of tourism that emerged in post-apartheid South Africa and Namibia. South African settlements are still visibly divided into wealthy, historically white suburbs and poor, historically black townships, because of the effects of apartheid and racial segregation. Township tourism, which has increased hugely in popularity since South Africa's multiracial elections of 1994, is now a multimillion dollar business (MSNBC, 2007).

Voluntourism. Voluntourism or volunteer travel, volunteer vacations is travel which includes volunteering for a charitable cause. The types of volunteer vacations are diverse, from low-skill work cleaning up local wildlife areas to providing high-skill medical aid in a foreign country. Originally most volunteer vacations were undertaken by people with a direct connection to a particular cause and were considered more as short term, intense volunteer projects rather than vacations (McGray, 2004).

Water tourism. Water tourism is traveling by boat while on holiday, with the express purpose of seeing things meant for the water tourist. This can be traveling from luxury port to luxury port, but also landing a boat for lunch or other day recreation at specially prepared day boat-landings. Also known as a boating holiday.

Wildlife tourism. Wildlife tourism can be an eco and animal friendly tourism in both captive and wild environments. It has experienced a dramatic and rapid growth in recent years worldwide. Wildlife tourism, in its simplest sense, is watching wild animals in their natural habitat.

Wine tourism. Wine tourism refers to tourism whose purpose is or includes the tasting, consumption or purchase of wine, often at or near the source (Carlsen and Charters 2006). Wine tourism can consist of visits to wineries, vineyards and restaurants known to offer unique vintages, as well as organized wine tours, wine festivals or other special events (Hall et.al, 2000).

Source: Encyclopedia (Wikipedia) and Selected Books and Articles.

2.2 Tourism: The Key Terms

Accommodations. A place in which to sleep, live, or work. It is something supplied for convenience or to satisfy a need as: lodging, food, and services or traveling space and related services (Andrews, 1985).

Adventure and outdoor recreation. An adventure is an activity that comprises risky, dangerous or uncertain experiences (Swarbrooke, 2003). The term is more popularly used in reference to physical activities that have some potential for danger. The term is broad enough to refer to any enterprise that is potentially fraught with risk, such as a business venture or a major life undertaking. As people in the world's wealthier regions lead increasingly sedentary life styles, the need for recreation has increased. Adventure recreation refers to active and outdoor activities such as backpacking¹⁶, rafting¹⁷, climbing¹⁸, and outdoor survival. Adventure recreation can be any number of leisure pursuits which provide exposure to physical danger. In contemporary society, the term outdoor adventure generally implies an educational or recreational activity that is exciting and physically challenging. Outdoor recreation activities have been defined by Queensland Outdoor Recreation Federation Inc. (2008) as those activities that: **(a)** are undertaken outside the confines of buildings i.e. in the outdoors, **(b)** do not involve organized competition or formal rules, **(c)** can be undertaken without the existence of any built facility or infrastructure, **(d)** may require large areas of land, water and/or air, and **(e)** may require outdoor areas of predominantly unmodified natural landscape.

¹⁶ backpacking (in US; tramping, trekking, or bushwalking in other countries) combines hiking and camping in a single trip. A backpacker hikes into the backcountry to spend one or more nights there, and carries supplies and equipment to satisfy sleeping and eating needs.

¹⁷ rafting or whitewater rafting is a challenging recreational activity using a raft to navigate a river or other bodies of water. This is usually done on whitewater or different degrees of rough water, in order to thrill and excite the raft passengers.

¹⁸ climbing is the activity of using one's hands and feet (or indeed any other part of the body) to ascend a steep object. It is done both for recreation (to reach an inaccessible place, or for its own enjoyment) and professionally, as part of activities such as maintenance of a structure, or military operations.

Airlines. A system or company for moving freight and passengers by aircraft (Agnes, 2005). It has also been defined as organizations providing aviation services to passengers and/or cargo. It owns or leases airliners with which to supply these services and may form partnerships or alliances with other airlines for reasons of mutual benefit.

Attractions. Attraction is exerted at both sensible and insensible distances, and is variously denominated according to its qualities or phenomena. It is a characteristic that provides pleasure and attracts. A tourist attraction is a place of interest where tourists visit. Some examples include historical places, monuments, zoos, museums and art galleries, botanical gardens, buildings and structures (e.g. castles, libraries, former prisons, skyscrapers, bridges), parks and forests, theme parks and carnivals, ethnic communities, historic trains, and cultural events (Mckercher and Cros, 2002).

Destinations. A tourist destination is a city, town, or other area that is dependent to a significant extent on the revenues accruing from tourism. It may contain one or more tourist attractions or visitor attractions and possibly some "tourist traps". It can be described as an area with different natural attributes, features or attractions that appeal to tourist (Coltman, 1998).

Hospitality. Hospitality refers to the relationship process between a guest and a host, and it also refers to the act or practice of being hospitable, that is, the reception and entertainment of guests, visitors, or strangers, with liberality and goodwill. Hospitality frequently refers to the hospitality industry jobs for hotels, restaurants, casinos, catering, resorts, clubs and any other service position that deals with tourists. Hospitality is also known as the act of generously providing care and kindness to whoever is in need (Reid, 2006; Hinkin, 2006; Bowie, 2004; Metelka, 1990).

Leisure. Leisure or free time is a period of time spent out of work and essential domestic activity. It is also the period of recreational and discretionary time before or after

compulsory activities such as eating and sleeping, going to work or running a business, attending school and doing homework, household chores, and day-to-day stress. There are many different definitions of leisure. One popular social psychological theory of leisure was put forward by psychology professor John Neulinger in the early 1970s. Neulinger (1981) defined leisure using three criteria: **(a)** the experience is a state of mind, **(b)** it must be entered into voluntarily, and **(c)** it must be intrinsically motivating of its own merit.

Recreation. Recreation or fun is the expenditure of time in a manner designed for therapeutic refreshment of one's body or mind. It is an activity undertaken for the pleasure or satisfaction which it gives to the individual (Sowyer, 1999).

Same-day visitors. A visitor who does not stay overnight in the place visited (Lubbe, 2005).

Spa. *The term spa is associated with water treatment* which is also known as balneotherapy, spa towns or spa resorts offering such treatment, or the medication or equipment for such treatment. The term has various related meanings, such as a spa town¹⁹, a destination spa²⁰, a day spa²¹, a health spa²² etc.

Tourism policy. Tourism policy is set of regulations, rules, guidelines, directives, and development/promotion objectives and strategies that provide a framework within which the collective and individual decisions directly affecting long-term tourism development and the daily activities within a destination are taken (Goeldner and Ritchie, 2006). Tourism policy developed and enacted by state agencies is the real basis for a state's role in tourism development. Promotion is just one aspect of policy even though it may well be the most visible and understood of a state's tourism development

¹⁹ a town visited for the supposed healing properties of the water.

²⁰ a resort for personal care treatments.

²¹ a form of beauty salon.

²² balneotherapy– is the treatment of disease by bathing.

activities. Basically tourism policy can be classified as either active or passive. Active tourism policy is intended to affect one or more sectors directly involved in the delivery of tourism goods and services including those reserved for delivery by the states. Passive tourism policy is not enacted to affect tourism directly but does so anyway in an indirect manner (Gartner, 2000).

Tourism research. Tourism research consists of the collection and analysis of data from both primary and secondary sources.

Tourist. A visitor staying at least one night in the place visited. In WTO Technical Manual (1995) the World Tourism Organization defines tourists as: People who "travel to and stay in places outside their usual environment for more than twenty-four (24) hours and not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited".

Transportation. Transportation is the movement of people and goods from one location to another. Transport is performed by various modes, such as air, rail, road, water, cable, pipeline and space. The field can be divided into infrastructure, vehicles, and operations. Passenger transportation is a vital component of the tourism system. It provides the critical linkage between market source and destination (Page, 2003).

Travel agencies. A travel agency is a retail business, that sells travel related products and services to customers, on behalf of suppliers, such as airlines, car rentals, cruise lines, hotels, railways, sightseeing tours and package holidays that combine several products. In addition to dealing with ordinary tourists, most travel agencies have a separate department devoted to making travel arrangements for business travelers and some travel agencies specialize in commercial and business travel only. There are also travel agencies that serve as general sales agents for foreign travel companies, allowing them to have offices in countries other than where their headquarters are located.

Virtual tour. A virtual tour (panoramic tour) is a simulation of an existing location, usually composed of panoramic images, a sequence of hyperlinked still or video images, and/or virtual models of the real location. They also may use other multimedia elements such as sound effects, music, narration, and text. As opposed to actual tourism, a virtual tour is typically accessed on a personal computer or an interactive kiosk.

International Air Transport Association. IATA (International Air Transport Association) is an international trade body, created some 60 years ago by a group of airlines. Today, IATA represents some 230 airlines comprising 93% of scheduled international air traffic. The organization also represents and serves the airline industry in general. IATA was founded in Havana, Cuba, in April 1945. It is the prime vehicle for inter-airline cooperation in promoting safe, reliable, secure, and economical air services for the benefit of the global consumers. The international scheduled air transport industry is now more than 100 times larger than it was in 1945. Few industries can match the dynamism of that growth, which would have been much less spectacular without the standards, practices and procedures developed within IATA. At its founding, IATA had 57 members from 31 nations, mostly in Europe and North America. Today it has some 230 members from 126 nations in every part of the globe. The modern IATA is the successor to the International Air Traffic Association founded in the Hague in 1919—the year of the world's first international scheduled services (Internet, iata 2009).

International Airline Passenger Association. It has been at the forefront of travel issues for over 40 years. IAPA was set up to represent the interests of frequent air travelers by protecting and promoting their rights as airline passengers, as well as providing them with special group discounts on items such as hotel accommodation, car rental and insurance (IAPA, 2008). Since its inception IAPA has been campaigning on behalf of frequent travelers— on safety and security, improving passenger comfort and getting better value for money. It strives to meet the needs of the frequent flyer and continue to stand up for the rights of the individual passenger at all opportunities.

International Association of Amusement Parks and Attractions. International Association of Amusement Parks and Attractions (IAAPA) was founded in 1918, is the largest international trade association for permanently situated amusement facilities worldwide. The organization represents over 4,000 facility, supplier, and individual members from more than 93 countries. IAAPA strives to help members improve their efficiency, marketing, safety, and profitability while maintaining the highest possible professional standards in the industry. Its mission is to serve the membership by promoting safe operations, global development, professional growth, and commercial success of the amusement parks and attractions industry (Internet, iaapa 2009).

Pacific Asia Travel Association. The Pacific Asia Travel Association (PATA) was established in 1951. It is an organization aiming to promote the sustainable development of tourism in the Asia-Pacific region. The PATA is the only travel trade association that represents Asia Pacific's leading public and private sector stakeholders, including all the major national and regional tourist offices, airlines, cruise lines, hotels and resorts, tour operators, travel agencies, tourist attractions, media, educational institutes and more.

World Tourism Organization. The World Tourism Organization is a significant global body, concerned with the collection and collation of statistical information on international tourism. The origin of the United Nation World Tourism Organization stems back to 1925 when the International Congress of Official Tourist Traffic Associations (ICOTT) was formed at The Hague. Some articles from early volumes of the Annals of Tourism Research claim that the UNWTO originated from the International Union of Official Tourist Publicity Organizations (IUOTPO), although the UNWTO states that the ICOTT became the International Union of Official Tourist Propaganda Organizations first in 1934 (Jafari, 1974). In 1970, the IUOTO general assembly voted in favor of forming the World Tourism Organization (WTO), based on statutes of the IUOTO, and after ratification by the prescribed 51 states, the WTO came into operation

on November 1, 1974. This organization represents public sector tourism bodies, from most countries in the world and the publication of its data makes possible comparisons of the flow and growth of tourism on a global scale. United Nations World Tourism Organization plays a role in promoting the development of responsible, sustainable and universally accessible tourism, paying particular attention to the interests of developing countries. The Organization encourages the implementation of the Global Code of Ethics for Tourism, with a view to ensuring that member countries, tourist destinations and businesses maximize the positive economic, social and cultural effects of tourism and fully reap its benefits, while minimizing its negative social and environmental impacts (Internet, unwto 2009).

World Travel and Tourism Council. The World Travel and Tourism Council (WTTC) is the forum for business leaders in the travel and tourism industry. With Chief Executives of some one hundred of the world's leading Travel and Tourism companies as its Members, WTTC has a unique mandate and overview on all matters related to travel and tourism (Internet, wtcc 2009). The World Travel and Tourism Council (WTTC) was conceptualized in the early 1980s when a group of CEOs (Chief Executive Officers) came to the realization that 'although Travel and Tourism was the largest service industry in the world and the biggest provider of jobs', nobody knew it. There was no consolidated data or voice for the industry to give the message to elected official and policy makers. *WTTC was established in 1990 and today the Council is positioned as the global business leaders' forum for Travel and Tourism, comprising the Chairmen and Chief Executives of 100 of the world's foremost organizations*, representing all regions and sectors of the industry. It works to raise awareness of Travel and Tourism as one of the world's largest industries, employing approximately 230 million people and generating over 10% of world GDP, WTTC works together with governments to raise awareness of the economic and social importance of the industry across the world.

2.3 Components of Tourism Industry

Tourism is a complex industry (Ghosh, 2000) that involves a wide range of businesses working at different levels– from service stations and newsagents to hotels, motels, tour operators, transportation media and travel agent etc. Each party in the chain contributes to the overall holiday experience of the customer. They form part of a network of wholesalers, retailers, and providers of tourism products and services that together deliver a complete travel package. If one party fails to deliver, the total travel experience of the customer could be ruined and reflect badly on all the other service providers, even if they did nothing wrong. Structure of Tourism Industry– a commonly held misconception is that tourism industry is made up of little more than hotels and motels, but in reality, it is much larger than that. However, a large part of tourism industry is a combination of Hospitality industry²³ and Travel Industry²⁴. Other than these, there are numerous other businesses, which offer services and products to the tourists and form a 'part' of the tourism industry. Tourism is a 'big picture' business– understanding where your organization fits into the network will help you to manage it successfully. The word "*Tourism*" does not comprise with a single component, it combines a compact of versatile elements. The tourism industry is made up of many sectors:

Accommodation sector. The sector related with providing staying and residential facility to the destination spot for the guests as shelter. Accommodation refers to the facilities for the lodging of visitors to a destination and the most common forms of which are hotels, motels, campgrounds, bed and breakfast (B&Bs), dormitories, hostels and the homes of friends and relatives (Coltman, 1989). This comprises hotels, motels, apartments, camps, guest houses, hostels, farmhouse, condominiums/time share units, vacation villages, holiday centers, lodge, bed and breakfast, house boats, resorts, cabins, villas, cottages, static and tourism caravan, marinas and so on.

²³ a combination of businesses related to accommodation and dining.

²⁴ businesses providing transportation services to tourists through different modes.

Attraction sector. The sector involved with the attractive and destination's amenities for which the tourists feel interest to visit the destination. This includes various types of attractions like natural, cultural educational, monuments, events, medical, social and professional etc. (Mckercher and Cros, 2002).

Tour operators sector. The sector consisted with the national and international tour operations on behalf of the tourists from the booking to the end of the visitation. This takes account of incoming, outgoing cruises, day tours and sightseeing, adventure tours, religious tours, educational tours and special interest etc (Swarbrooke et.al, 2003).

Business tourism sector. The sector associated with arrangement of business tourism to meet the want and demand of the business tourists. This combines incentive programmer, meeting organizers, event organizers, conference organizers and so on (Fenich, 2005).

Transportation sector. The sector linked with transporting the tourists from one place to another place. It may be useful for domestic, inbound or outbound tourism industry. It consists of all types of transportation like air, water and road. It includes airlines, roadways, railways, ships, cruises, rent-a cars and other vehicle hiring, local transportation including city buses, auto/taxi, boats, trams, local trains and so on (Page, 2003).

Distribution coordination and facilitating services sector. The sector correlated with the efforts of distribution, coordination and facilitating through various organizations like National Tourism Organization, Regional Tourism Organization, Destination Marketing Organization, Destination Management Authority etc. These embraces Government agencies (at all levels), packaging agents, guides, tour managers, ticketing agents, tour wholesalers, holiday sellers, industry associations, machinery and equipment hiring and leasing etc. (Ransley and Ingam, 2000).

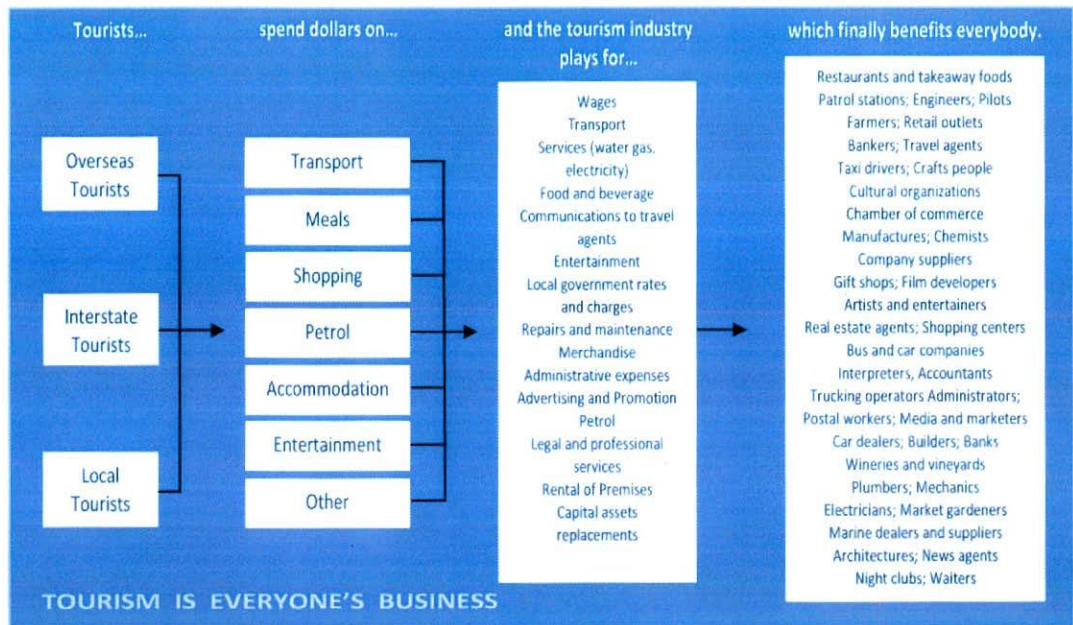
Retail services sector. The sector connected to fulfill the demand of the tourists by providing retail outlets for their buying tendency to make the visit memorable. This comprises art and crafts, garments, souvenir, books, medicine, luggage and all other retail shops used by tourists (Goeldner, 2006).

Food and beverage sector. The F&B sector interrelated to provide dining facilities for the visitors at their affordable costs. This may start from the restaurant to luxury hotels at the level of the tourist's demand. This combines hotels (all kinds), local restaurants, roadside joints, cafeterias, all retail counters serving food and beverage etc. (Ball, 2003; Robinson, 2005; Lattin, 2002; Lillierap, 2002).

Other supported sectors. There are also some supporting sectors allied to the development of the tourism industry to achieve the entire satisfaction of the tourists. This may include insurance (travel, life, medical, luggage etc.), recreational service, communication service (Phone, Fax, Internet, Postal service etc.), and Banking services and the like (Fischer, 2005; Mason, 1990).

2.4 Tourism as an Important Element of the Economy

Tourism can bring together people of different regions, countries, and backgrounds and may promote greater regional and international understanding. The expenditures of visitors have direct, indirect, and implicit impacts throughout the economy, in terms of revenues, foreign exchange earnings, employment, value additions, investments, productions, and business opportunities. It contributes on the economic diversification and has a significant multiplier effect. A well administered tourism program can make certain gains for everyone in the industry. These gains can be significant in regional communities by diversifying the economic base of those communities (TNSW, 2010). The following chart (Figure: 2.2) demonstrates the significance of tourism within the economy and the community.

Figure 2.2: Tourism Impact within the Economy and Community

Source: Tourism New South Wales, Sydney, Australia.

The international market place for tourism (Britton, 1982) is ever expanding with newer and newer destinations coming on to the surface. During the last three decades the tourism industry has grown rapidly, benefiting notably from economic development (Chao, Hazari, and Sgro, 2005), the rise in purchasing power and increased leisure time (Schloegl, 2000). Therefore, there is no doubt to believe that the tourism's growth will continue to be visible in the days to come.

The activities of tourism have significant potential for widening the contributions of globalization squarely by reaching different kinds of economies, including the poorest countries and some remote areas where few alternatives for development exist. In recent years, it has become one of the fastest growing service activities in the low-income countries. In addition, tourism is the main thrusting force for building and promoting the image of a country as a whole (Schloegl, 2000).

Tourism is an important creator of jobs in number terms and that it creates jobs for many of those groups that suffer most from unemployment/disguised employment. Tourism, to a more than average degree, employs women, young people as well as the disadvantaged. It is necessary to mention that access to holidays has become an important factor of development and personal enrichment and thus contributes to people's well being (Schloegl, 2000; TNSW, 2010). This is particularly true for youngsters, for the senior citizens and for those with meager incomes, along with well-off.

Tourism activities can greatly contribute to environmental protection and to social, cultural, economic and regional prosperity. It has synergies with conventional activities (agriculture, handicrafts) and is often a development tool for local and rural communities (Kline, Cardenas, and Sanders, 2007) as well as for urban areas (national heritage, cultural amenities). As the natural environment constitutes its basic resource, tourism can become an active propelling force for sustainable development and can dynamically influence other industries and businesses to contribute to this goal (Schloegl, 2000).

However, tourism can generate four different types of local cash income (Ashley, Boyd, and Goodwin, 2000) generally involving four distinct categories of people: **(a)** wages from formal employment, **(b)** earnings from selling goods, services, or casual labor e.g. food, crafts, building materials, guide services, **(c)** dividends and profits arising from locally-owned enterprises, and **(d)** collective income i.e. profits from a community-run enterprise, dividends from a private sector partnership and land rental paid by an investor. Waged employment can be sufficient to lift a household from insecure to secure, but may only be available to a minority, and not the poor. Casual earnings per person may be very small, but much more widely spread (Ashley, 2000; Shah, 2000), and may be enough, for instance, to cover school fees for one or more children. Guiding work, although casual, is often high status and relatively well paid.

2.5 Interrelationship between Tourism, and Human and Social Assets

The state of tourism depends on socioeconomic progress, and on human and social assets that are available globally or in a given country. Measurement of these assets can be done using indicators including (a) the individual freedom, (b) equal opportunities, (c) the education in a society, (d) material well being, (e) health condition, (f) the security of people, (g) the cultural identity of communities, and (h) the ability to tolerate differences. However, the human and social potential of tourism is important since the tourist phenomenon contributes to extend human and social assets. Tourism represents the most popular form of individual happiness particularly in developed societies that allows uncovering the last liberties in a society that is ever more subject to regulations of any kind. The brevity of tourist quality time allows human beings to better face daily challenges (Keller, 2001).

2.6 Managing Tourism Development

Managing tourism development as a major policy challenge, recognizing the importance of tourism is one thing and making a balanced assessment of tourism activity is another. Through its multidisciplinary work, the nation can look at tourism development from a broader policy perspective, to assist policy-makers (Schloegl, 2000):

First, all industries create negative and positive impacts on the economy, society and environment. We cannot isolate the different types of tourism impacts such as environmental, social, cultural and economic. The fragmented nature of the tourism industry augments the risks of unbalanced development of infrastructure and market expansion, which in turn leads to increased pressures on environmental/cultural resources and on the local population.

Second, it is understood that the tourism is intertwined with many other industries and services and their underlying policies. Making growth-oriented economic policy for tourism is a challenge that goes well beyond the portfolios of national tourism administrations and requires greater co-operation between tourism and other economic areas. Tourism remains a fragile industry: it is heterogeneous and dominated by Small and Medium Enterprises (SMEs) with very diverse growth and profitability. Multi-disciplinary approaches should be promoted to gain a better understanding of what the tourism phenomenon represents and how related policy-decisions affect tourism.

Third, the growth opportunities for tourism are excellent. These opportunities may be affected by many key issues. It is assumed that tourism will be affected by issues like globalization, liberalization, innovation, new technologies, global warming, and demographic changes. Simultaneously, potential threats should also be considered to the growth of tourism such as health, security, capacity constraints, economic and social problems. All these linkages should be better cross-analyzed to increase policy coherence and allow governments to assess the real potential of growth and the policy requirements and to react and adjust their policies and actions.

There is no reason to believe that tourism will grow in all parts of the world equally. It will have to compete with other fast-growing services. The developed economies are faced with increased inter-national competitiveness and with important sectoral/industrial and cross-sectoral challenges, which influence and modify the role of central governments in tourism. Global tourism industry will be increasingly affected by economic, environmental and transport policies as well as by emerging systemic risks. Dealing with the development of tourism is a major policy challenge that requires a broad multi-disciplinary approach, closer intergovernmental cooperation and more analytical and research work addressing these issues.

Tourism generally is considered as a booming sector worldwide. This view is usually based on aggregate figures at both the national and international levels. These reflect the extension of the world market, but not the reality of everyday tourism. In the battlefield of international tourism there is a trade-off of fierce competition on a worldwide basis. As tourism is a fragile industry, there is no guarantee of lasting growth either at the level of the destination or of the individual tourism enterprise. We reminded ourselves that demand is volatile in the field of tourism, albeit exposed to a whole series of disturbing outside factors. Tourism service providers are often unable to show sufficient earnings to attract large sums of outside capital. In these cases tourism cannot produce the desired effect on employment and revenues, and it then becomes difficult to finance modernization of the products and services.

2.7 Measuring Tourism

The beginnings of modern tourism date from the middle of the nineteenth century but its systematic measurement began only in the twentieth century. The need arose as the volume of the tourists traffic began to reach significant proportions after the World War-I. Measuring of tourism is important for the future tourism planning, management and development programs to achieve the competitive advantage in the global tourism market place (Bhatia, 2006).

Once we have agreed on a definition of what tourism is an entity and how it is constructed, a range of technical definitions are often developed to try to add precision to the scale, volume and significance of tourism as a global activity. Measuring tourism also helps with understanding some of the problems that planners and decision makers need to address in planning for tourism and future growth scenarios (Huan and O'Leary, 1999; Page, 2007).

There are three basic considerations in trying to define tourism as an activity: **(a)** what is the purpose of the travel²⁵?, **(b)** what time dimension is involved in the tourism visit²⁶?, and **(c)** what situations exist where some countries may or may not choose to include travelers as tourists²⁷? The answers of these questions are still inclusive (Page, 2007).

Page (2007) has recognized five important reasons for *measuring tourism*: **(a)** to understand why it is significant and to what degree for certain destinations, countries and regions, in terms of the scale and volume of the visitors, **(b)** to understand how important it is for countries in terms of their balance of payments, as it is an invisible export that generates foreign currency and income, **(c)** to assist the tourism industry and governments in planning for and in anticipating the type of infrastructure that is required for tourism to grow and prosper, **(d)** to assist in understanding what type of marketing initiatives is required to reach tourists as consumers, and what factors will influence them to visit a country or destination, and **(e)** to help the tourism industry in making decisions regarding the type of action needed for further development in the concerned area.

In general, measuring tourism through the collection, analysis, and interpretation of statistics is essential for the assessment of the volume, scale, impact, and value of tourism at different geographical scales from global to country level and down to individual destinations. *The interpretation of tourism data is fraught with danger.* Page (2007) has also suggested few issues while measuring tourism such as: **(a)** tourism statistics are normally estimates, often derived from sample surveys. As such, they are subject to various forms of error, **(b)** for measurements which result from sample surveys, in general the smaller the sample size, the greater is the likely error, **(c)** even a large sample size for data relating to a region may give rise to acceptable levels of error.

²⁵ e.g. business travel, holiday, visits to friends & relatives, and other purposes.

²⁶ in most cases, tourism would involve a minimum of 24 hours and a maximum of a year away from home.

²⁷ cruise passengers, tourists in transit, excursionists who stay less than 24 hours at a destination.

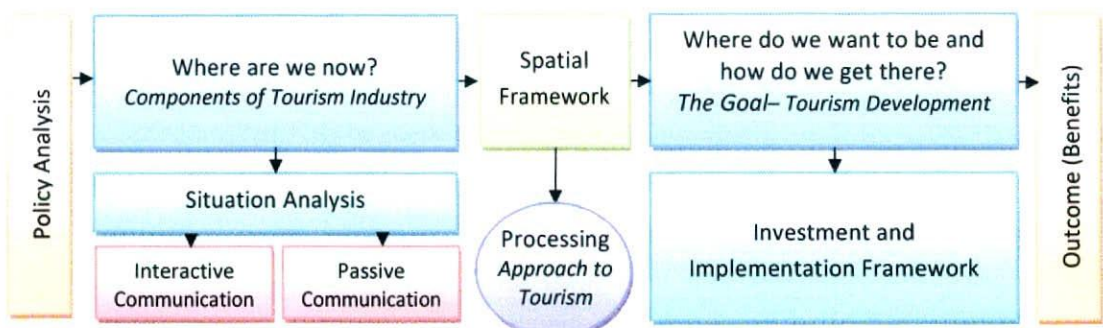
Analysis of a subset of the data pertaining to a smaller region may not be feasible due to the much reduced sample size, **(d)** where the methodologically in collecting data changes, it is dangerous to compare results, and **(e)** there are serious problems involved in attempting to compare figures collected by different countries.

2.8 Development of Tourism and Economic Development are integrated

Tourism and Development. Tourism and development have been linked to one another since somewhat simultaneous emergence as both phenomena of mass interest and mass activity in the second half of the 20th century are existed. The importance of understanding and their relationship have received attention from a wide range of academic disciplines and public and private sector enterprises alike (Simms, 2005).

Tourism Development embodied: **(a)** the sustainable development and maintenance of tourism attractions, facilities and infrastructure, **(b)** expanding the range of products and services available to meet the needs of tourists, **(c)** building a tourism culture and awareness, and **(d)** building capacity of local business to benefit from the opportunities offered through the tourism industry, with special focus on spreading the benefits to the people of disadvantaged communities (CCT, 2005). A schema of tourism development is presented in Figure 2.3.

Figure 2.3: General Tourism Development Model



Source: Tourism Development Framework, City of Cape Town, South Africa, 2005.

The schema is, though complex, but entails the whole gamut. However, tourism is an imperative root of economic growth and development in many countries around the world. Over the past several decades, travel and tourism has become a key sector in the world economy (Blanke and Chiesa, 2006).

The preliminary assumption of tourism as a vehicle for economic growth, early research linking development and tourism focused mainly on their impact on a country's trade and industry. While today economic measurements are still at the core of the debate, interest in evaluating tourism's impact as a vehicle for international development from a holistic perspective has created a shift in research motives towards social sciences in the fields of anthropology, sociology, environmental studies, as well as political science. At the same time, public policy interests have become recognized for their integral role in development theory and international tourism activity, resulting in the creation of especially assigned Para-national organizations and intergovernmental agencies; most notably, the foundation of the International Monetary Fund (IMF) and the World Bank's International Bank for Reconstruction and Development (IBRD) in 1945, the United Nations departments assigned for development (UNDP) in 1965 and for tourism (UNWTO) in 1975.

The involvement of stakeholders from different interest groups therefore inevitably resulted in the production of dissimilar knowledge that can in principal be accredited to the positioning on the political spectrum or disciplinary perspective. Despite continuous challenging of the separate concepts of tourism as well as development in and Tourism: Creating a framework for a vehicle for economic development In underdeveloped societies of themselves, tourism's importance for development and development's importance for tourism has tacitly been recognized and has largely gone unnoticed. This implicit understanding created the context for a research environment engaged in evaluating tourism's impact on its host societies from economical, sociological, anthropological, political, environmental and holistic perspectives.

In this global competitive era, it is quite impossible to grab the world tourism market without having proper marketing campaign for a particular product or service. In case of tourism, it is a critical issue to motivate the target market in a favorable way for the unknown, mysterious but exotic destinations to come and enjoy their free time for their leisure, business or other purposes.

The global tourism market continues to boost up. In order to capture a significant portion of the tourism market, a country must remain competitive with other destinations. The government of that country must allocate the necessary resources for tourism development so that the country is on a level playing field with short-haul as well as long-haul destinations around the world. The development on behalf of a destination is the responsibility of several groups including the National Tourism Organization (NTO), regional and local Destination Marketing Organizations (DMOs) and private sector companies involved with tourism industry. The National Tourism Organization (NTO) is the key actor and works to coordinate country's development efforts home and abroad in order to drive visitation among various tourist spots.

In a nutshell, the economic potential of tourism is extensive and the appropriate development strategies intend to maximize the benefits tourism can generate. The destination aims to work alongside a dedicated and professional tourism industry sector to ensure the region maintains and grows its share of the lucrative tourism market. Key challenges to achieving it includes: **(a)** responding strategically and creatively to growing levels of competition, **(b)** responding to changing economic and social trends, **(c)** increasing tourism dispersal throughout the tourist destination, and **(d)** maximizing visitation, yield and visitor satisfaction. These aspects have taken-up for subtle discussion in subsequent chapter (Chapter 5).

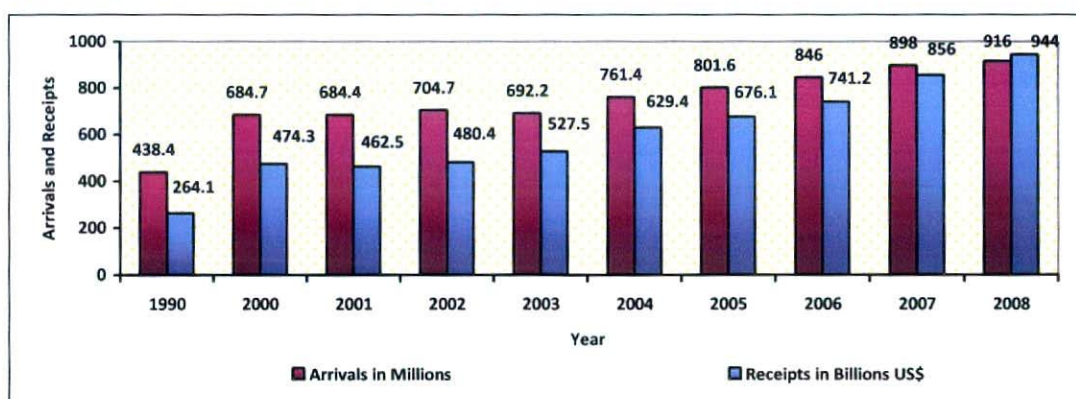
Chapter Three

Tourism Worldwide: An Overview of OIC Countries

3.1 Global Scenario of Tourism: Market Trends in the New Millennium

Tourism is the largest business sector of the world economy, accounting for 10% of global GDP, one in twelve jobs globally, and 35% of the world's export services (CESD, 2007). After the tourism boom decade of the 1990s, with an average annual global growth of 9% (EFS, 2005), international tourist arrivals declined in the early time of new millennium affected by global economic recession, SARS virus, the 9/11 terrorist attacks and subsequent U.S. led war on terrorism which caused a decline in the U.S. vacation and leisure travel market¹ (Tourism Barometer, 2006), terrorist attacks in Kenya², Indonesia³, Morocco, Egypt⁴ and Spain, extreme weathers like the Indian Ocean Tsunami, Hurricane Katrina, and emerging fears of a bird flu epidemic. International tourist arrivals worldwide increased from 438.4 million in 1990 to 684.7 million in 2000, corresponding to an average growth rate of 4.58% per annum and in the same period, international tourism receipts increased from US\$ 264.1 billion to US\$ 474.3 billion at an average growth rate of 6.15% per annum. [Table: 3.1, Table: 3.2, and Table: 3.3]

Figure 3.1: Worldwide International Tourism



Source: Table: 3.1 and Table: 3.2 in the Annex.

¹ in 2006, international arrivals to the U.S. had regained their pre-9/11 level because of the strength of the domestic tourism market (Tian, 2007).

² the bombing of an Israeli-owned hotel on the Kenyan coast.

³ two bombings in Bali, Indonesia.

⁴ bombings of hotels and restaurants along the Red Sea Coast.

Tourist arrivals. In 2001 and again in 2003, there was a fall in tourism industry in many countries as well as worldwide, international arrivals dropped by 1.2%, to 692.2 million in 2003. However, international tourist arrivals recorded in 2001 was 684.4 million. [Table: 3.1 and Table: 3.3]

The year 2002 was not an unproblematic year for the industry. International tourism held up fairly well in that year where the number of international tourists grew by 2.97%. In fact, the 704.7 million international tourist arrivals recorded in the same year which exceeded the previous record of year 2000 from 684.7 million, indicated a significant change in the world tourism industry. [Table: 3.1 and Table: 3.3]

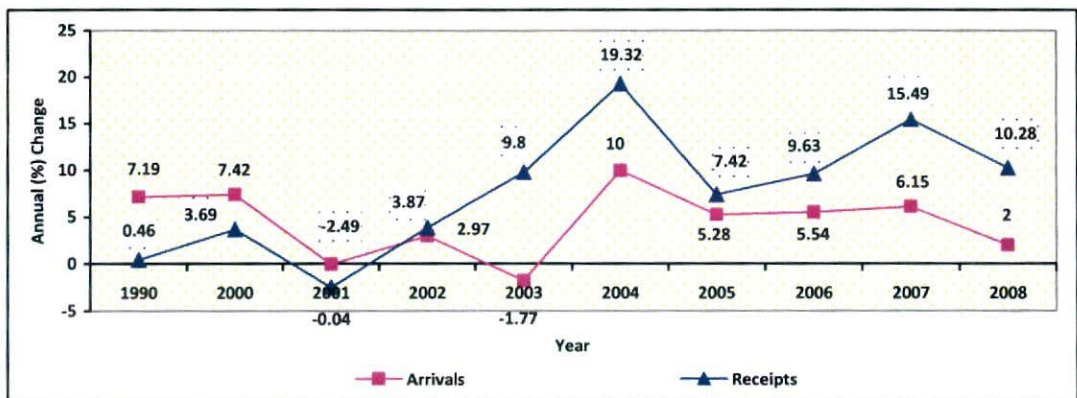
In 2004, tourism's strong recovery from inauspicious situations between 2000 and 2004 demonstrated the industry's strength—reached a record of 761.4 million, with a growth of 10% as compared to 2003. Particularly the economies of the major tourism generating regions of the Americas and Europe with the growth of the Asian economies, strongly contributed to the great results of tourism during this period. [Table: 3.1 and Table: 3.3]

International tourism worldwide beat all the expectations achieving an all-time record of 801.6 million arrivals in 2005, corresponding to an increase by 5.28% with 846 million arrivals in 2006 and 897.7 million arrivals in 2007, international tourism recorded a fourth year of constant growth, although faced other destructive issues during this period viz. terrorism, health scares, oil price increases, exchange rate fluctuations, and economic and political uncertainties. [Table: 3.1 and Table: 3.3]

In 2006, the world tourism continued to go up with annual growth of 5.4% over the previous year and the world tourism reached a new height in 2007, at a corresponding rate to 6.15% increase over the year 2006 [Table: 3.1 and Table: 3.3]. Madrid (2009) has disclosed that the international tourism receipts rose by 2.8% in 2008 (in real terms),

virtually equaling growth in international tourist arrivals 1.9% to 922 million. However, in recent time, UNWTO estimates that the worldwide tourist arrivals reached 916 million in 2008 at a growth rate of 2% over the year 2007 (Madrid, 2009). [Table: 3.1 and Table: 3.3]

Figure 3.2: Worldwide International Tourism (Annual % Change)



Source: Table 3.3 in the Annex.

Tourism receipts. International tourism receipts recorded US\$ 462.5 billion in 2001 at a declined rate of 2.49% over the year 2000. In 2002, international tourism generated US\$ 480.4 billion as international tourism receipts, corresponding to an annual growth rate of 3.87% over 2001. Although tourist arrivals dropped slightly in 2003, International tourism receipts recorded US\$ 527.5 billion, corresponding to an increase by 9.8% over the previous year⁵. In 2004, US\$ 629.4 billion was generated in case of international tourism receipts at a growth rate of 19.32% over the last year. [Table: 3.2 and Table: 3.3]

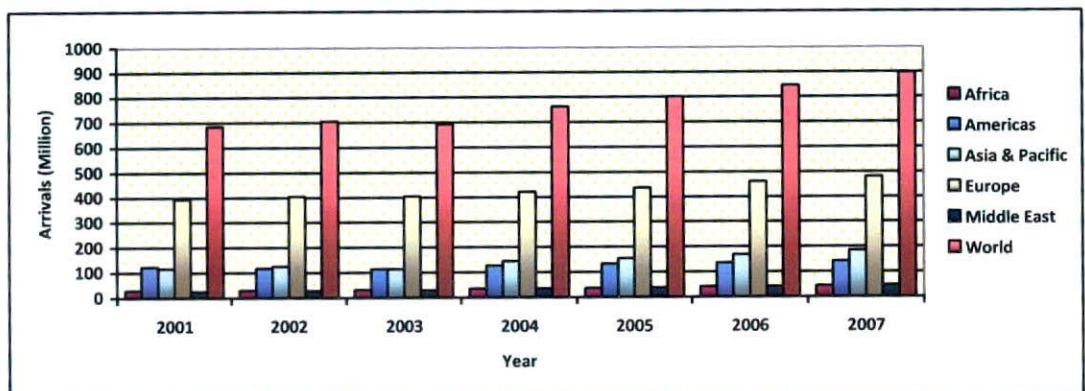
In a similar manner, US\$ 676.1 billion in 2005, US\$ 741.2 billion in 2006, and US\$ 856 billion in 2007 were also recorded as international tourism receipts with a growth of 7.42%, 9.63%, and 15.49% as compared to 2004, 2005, and 2006 respectively [Table: 3.2 and Table: 3.3]. In recent time, UNWTO estimates that the worldwide receipts from

⁵ it is seemed as a reflection of the strong depreciation of the US dollar against many other currencies during the periods. As a result, receipts earned other currencies seemed higher in terms of dollars.

international tourism reached US\$ 944 billion in 2008 at a growth rate of 10.28% over the year 2007 (Madrid, 2009).

World tourist arrivals by region. The world tourism continued to grow from the year 2004 and reached a new height as compared to the previous year's figures. All regions of the world recorded growths in 2007, ranging from a low of 4.2% in the Europe region to a high of 13.2% in Middle East region. [Table: 3.5]

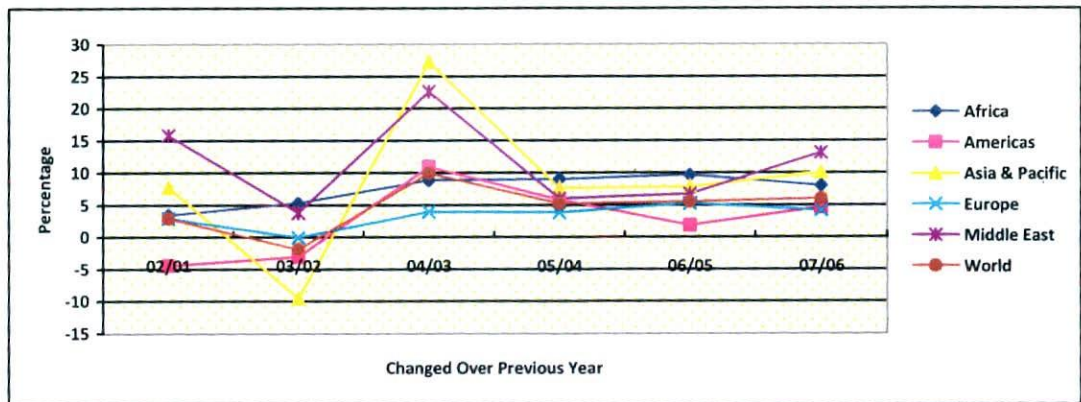
Figure 3.3: World Tourist Arrivals by Regions in Million during 2001 to 2007



Source: Table: 3.4 in the Annex.

In absolute terms, the highest increase of 30.9 million arrivals was recorded in the European region in 2004 while the lowest increase of 2.2 million arrivals was recorded in the Middle East region in 2005 after the strong recovery from depressing conditions between 2000 and 2004 in tourism industry worldwide. [Table: 3.4]

Figure 3.4: Percentage (%) Changed in World Tourist Arrivals by Regions during 2001 to 2007



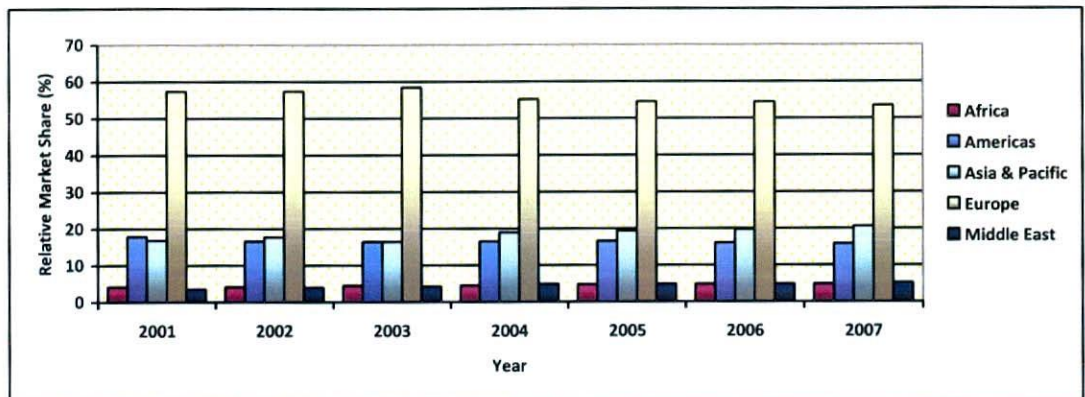
Source: Table: 3.5 in the Annex.

In 2007, the additional 52 million tourist arrivals were roughly split for Europe 19.3 million, 10.2 million for Asia and Pacific, 6.4 million for Americas, 5.4 million for Middle East, and 3.3 million for Africa with an annual growth of 4.2%, 10.2%, 4.7%, 13.2%, and 8.1% respectively as compared to the previous year 2006. [Table: 3.4 and Table: 3.5]

Relative shares of world tourism. In the industry, Europe and Americas jointly are regarded as more traditional tourist receiving regions of the world. It has been revealed that in 2007 European region received 53.5% shares, represents more than one half of world tourism, but the shares of world tourism received by the European and the American regions together⁶ gradually declined and the corresponding increases noticed in the shares of developing regions⁷, during this period. Hence, the combined share of the traditional regions declined from 71.8% in 2001 to 69.1% in 2007 and the developing regions remained either relatively stable in their shares or recorded slight increases (ASR, 2006) over the year 2001. [Table: 3.6]

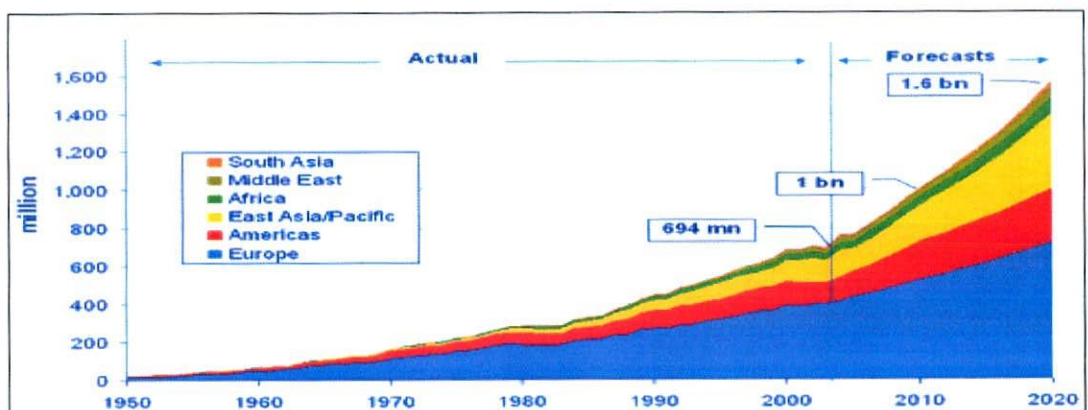
⁶ Europe and Americas received together 69.3% shares, more than seven-tenth of world tourism in 2007 maintaining the traditional scenes of international tourism.

⁷ Asia Pacific, Middle East and Africa is regarded as developing regions.

Figure 3.5: Relative Shares of World Tourism Received by Region during 2001 to 2007

Source: Table: 3.6 in the Annex.

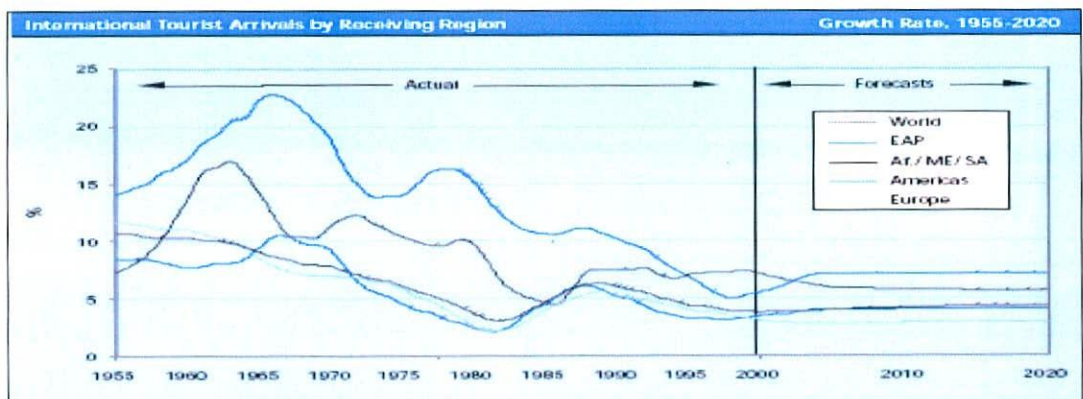
However, The UNWTO (2001) forecasts that international arrivals are expected to reach nearly 1.6 billion by the year 2020. Of the worldwide arrivals in 2020, 1.2 billion are projected to be intraregional and 378 million to be long-haul travelers. The total tourist arrivals by region show that in 2020 the top three receiving regions will be Europe (717 million tourist arrivals), East Asia and the Pacific (397 million), and the Americas (282 million), followed by Africa (77 million), the Middle East (69 million), and South Asia (19 million). [Table: 3.7]

Figure 3.6: International Tourism Arrivals to 2020

Source: UNWTO, Global Forecasts and Profiles of Market Segments (Madrid: World Tourism Organization, 2001). p.3.

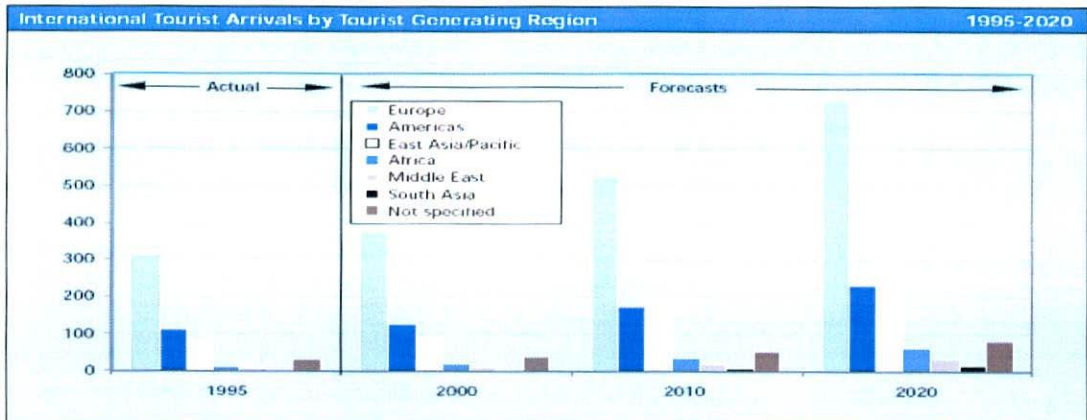
Although Europe and America observe as the top destinations in international travel, representing about 70% of all international tourist arrivals, are given an apparent idea about lower trend than average growth rates. Europe will uphold the maximum share of world arrivals, although there will be a turn down from 59.8% in 1995 to 45.9% in 2020. East Asia/Pacific (6.5%), South Asia (6.2%), the Middle East (6.7%), and Africa (5.5%) are estimated to record growth rates of over 5% per year, compared to the world average of 4.1% [Table: 3.7]. In addition, the more resource-intensive type of travel, long-haul, is predicted to grow even faster worldwide, at 5.4% per year over the period 1995-2020, while intra-regional travel is projected to grow at 3.8% (Madrid, 2001).

Figure 3.7: International Tourism Arrivals by Receiving Region



Source: Tourism 2020 Vision: Europe, Volume 4, World Tourism Organization, Madrid, January 01, 2001, p.11.

The Tourism 2020 Vision study forecasts that there will be over 729 million outbound tourist arrivals generated from Europe in the year 2020, corresponding to an annual growth rate of 5.8% over the period 1995-2020 followed by East Asia/Pacific (405 million, corresponding to an annual growth rate of 6.5% over the period 1995-2020), Americas (about 230 million), Africa (62 million, corresponding to an annual growth rate of 6.2% over the period 1995-2020), Middle East (35 million, corresponding to an annual growth rate of 5.8% over the period 1995-2020), and South Asia (17 million, corresponding to an annual growth rate of 5.64% over the period 1995-2020).

Figure 3.8: International Tourism Arrivals by Tourist Generating Region

Source: Tourism 2020 Vision: Europe, Volume 4, World Tourism Organization, Madrid, January 01, 2001, p.12.

However, Europe will remain the world's largest tourist generating region by some considerable margin, it is losing its market share. In 1995, 55% of all outbound tourists were from Europe. By 2020, this will decline to around 47% (WTO, 2001).

Furthermore in another study, it has been elucidated that the following two trends are played a significant role for tourism growth worldwide: **(a)** baby boomers⁸ of developed countries, and **(b)** the emergence of China as a major actor in tourism industry where 100 million annual outbound tourists are expected by 2020 (Honey and Krantz, 2007; TE, 2006). In this day and age, the baby boomer generation⁹ is traveling, investing, and living more abroad than ever before and on the other side of the globe China is on the edge of becoming the world's powerhouse in tourism, as more foreigners' vacation in China and more Chinese travel at home and abroad. China is experiencing exceptional growth, with over 131 million international arrivals in 2007 and over 1.6 billion domestic tourists (CTS, 2009). The UNWTO predicts that by 2020, China will become both the world's largest

⁸ those who born between 1946 and 1964 (UCB, 2006).

⁹ two times more baby boomers are traveling than 20 years ago and Some four million (non-military) Americans are living overseas, and 442,000 of these are receiving their social security checks abroad (Davies, 2005). Baby boomers will be a particularly potent factor as second home sales continue to increase in parallel with the number of retirees from America and Europe.

tourism destination and the largest country for outbound travelers as well (TCD, 2004). The development of China's domestic tourism can be attributed to four key factors: **(a)** disposable income, **(b)** public holidays, **(c)** motivations for travel, and **(d)** travel products and services to facilitate domestic travel. In case of protecting China's natural and cultural attractions, a number of ecotourism projects¹⁰ has begun in China (Cater, 2000; Wen and Tisdell, 2001), particularly in and around protected areas and culturally rich areas (Machik, 2007).

To conclude, it is rational to state that tourism industry plays a major role in the economies of 125 of the world's 170 countries, (Grossman and Koch, 1995; Lord, 1997; Lascuráin, 1996; Brandon, 1996; Crossette, 1998) and has become increasingly essential for developing countries. However, the growing figures in international tourist arrival worldwide are expected to continue over the next dozen years.

3.2 International Tourism in Islamic (OIC) Countries

OIC, the organization of the Islamic Conference with 57 Islamic countries located in KSA¹¹, taken by almost 1.5 billion people and spread over in Asia, Africa, Europe and South America continents. As the second largest international organization after United Nations (UN), the OIC, since its establishment in 1969, has been following up a varied and ever-expanding agenda covering, besides political affairs, cultural, economical, technical, and scientific issues of concerns to its member countries (Alpay, 2008), with a distinct emphasis on the promotion of the joint action and enhancement of cooperation amongst its member countries. The OIC aims at securing sustainable development and high welfare levels in the member countries through efficient utilization of their collective natural and human resources as well as very much concerned regarding the

¹⁰ China's first "planned ecotourism destination" was completed by an international team of architects and builders, in consultation with a rural community in 2006 (Figart, 2006).

¹¹ headquarter in Jeddah, Kingdom of Saudi Arabia.

development of tourism industry. The OIC organizes tourism related conferences almost every year in deferent member countries¹². Yet, the OIC countries have a high potential for the development of an International tourism considering the thriving and varied natural, geographic, historical, and cultural heritage assets.

International tourism activity is characterized by a continuing geographical spread and diversification of tourist destinations (SESRIC, 2008). The substantial growth of the international tourism activity is one of the most remarkable economic and social phenomena of the past century (French, 2005). However, the activity of OIC tourism is found in only a few member countries while other members have an unpretentious share in the world tourism industry. This potential is not being fully utilized by the OIC region. The tourism industry is one of the largest industries in the world, and despite recent events that have made its operating environment more complex (Theobald, 2005). So, a well organized planned is essential for the development of tourism and the socio-economic environment in this region that can take part a major role in the development phenomena of OIC countries.

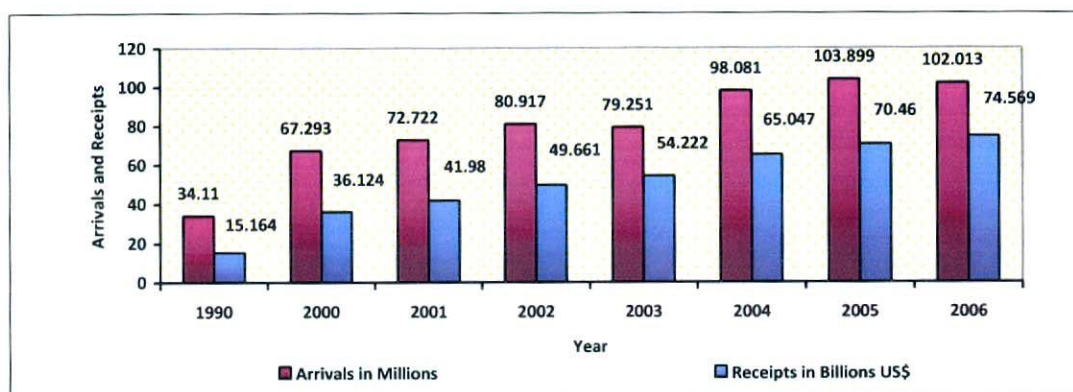
Tourism has been one of the major economic and social phenomena of the twentieth century (Neto, 2002), and it's activities enjoyed by only a small group of relatively well-off people at the beginning of the century, it had become a mass phenomenon in the more developed countries by the 1970s and has now reached wider groups of people in most nations (Annan, 2001).

Tourist arrivals. In 1990, the number of international tourist arrivals in OIC region reached 34.1 million with a average growth rate of about 7% compared to the last year. Over the period of 1990 to 2000, the total volume of international tourist arrivals in this region increased by an annual average rate of 7% and reached almost 67.3 million, is

¹² for instance, International Seminar on "Development of Tourism in the Muslim World", in Turkish Republic of Northern Cyprus, April 15, 2009 – April 17, 2009; International Seminar on "Development of e-Tourism Technologies in Islamic Countries" in Bangladesh April 22, 2008 – April 24, 2008.

higher than the world average and the averages of the traditional tourist receiving regions¹³ and the contribution to the world tourism industry in the year 2000 accounted for only 9.8% at an average annual growth of 2% over 1990. [Table: 3.10 and Table: 3.11]

Figure 3.9: International Tourism in Islamic (OIC) Countries during 1990 to 2006



Source: Derived from Table: 3.10 in the Annex.

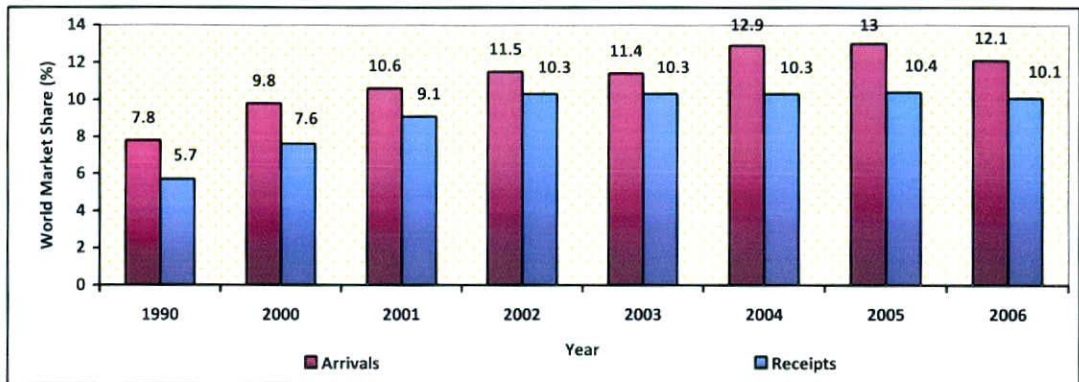
The number of tourist arrivals received by the OIC region recorded in 2001 was 72.7 million with a growth rate of 8.1% compared to the year 2000 and captured the world share at the rate of 10.6% as well. [Table: 3.10 and Table: 3.11]

In 2002, the OIC countries hosted 81 million international arrivals at a growth rate of 11.3% over the year 2001 and 11.5% world market share attained during this time. But in 2003, the arrivals dropped by 2.1% and received 79.2 million international arrivals due to few adverse circumstances in the South East Asian region¹⁴ for instance, epidemic issues, economic conditions, and war in the Middle East region. However, the relative share of the world volume of arrivals appeared 11.5% for the period of 2003. [Table: 3.10 and Table: 3.11]

¹³ during the period 1990-2000, the world average growth was recorded 4.6% and average growth of 4% and 3.3% was recorded for Europe and Americas.

¹⁴ drop of 2.7 million arrivals in Malaysia and 0.6 million arrivals in Indonesia (SESRI, 2008, p.9).

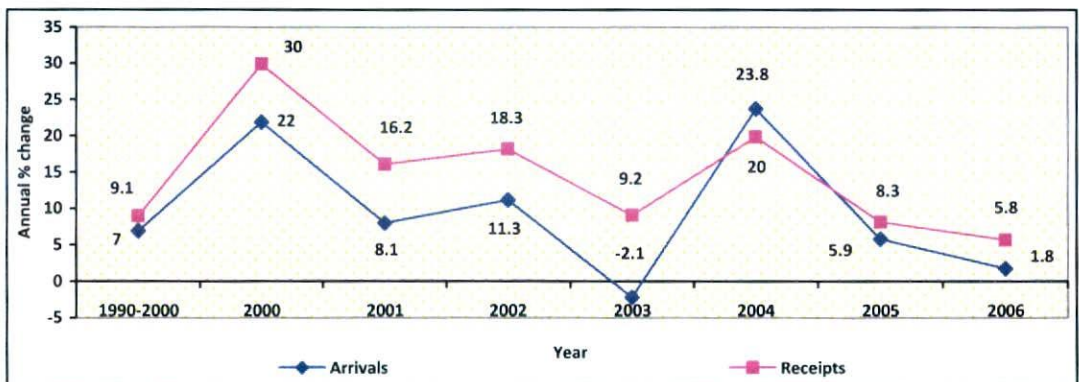
Figure 3.10: International Tourism in Islamic (OIC) Countries during 1990 to 2006, Share in the World Market (%)



Source: Derived from Table: 3.11 in the Annex.

The number of international tourist arrivals attains 98.1 million in 2004 and 103.9 million in 2005 respectively, corresponding to an increase by 23.8% and 5.9% over the respective previous year¹⁵ and contributed to the worldwide volume arrivals by sharing 12.9% in 2004 and 13% in 2005. [Table: 3.10 and Table: 3.11]

Figure 3.11: International Tourism in Islamic (OIC) Countries during 1990 to 2007 (Annual % change)



Source: Derived from Table: 3.10 in the Annex.

¹⁵ some countries were affected by natural disaster and other economic and political uncertainties. Indonesia, Maldives and Bangladesh in particular affected by Tsunami in Indian Ocean.

But in 2006, another drop in international tourist arrivals in this region was observed by 1.8% to 102 million¹⁶ and at the same time, OIC share in the worldwide tourist arrivals also dropped by 12.1%, first in the new millennium. [Table: 3.10 and Table: 3.11]

Tourism receipts. Tourism has become one of the main economic activities (Appiah, 2009) and an important source of foreign exchange earnings and employments in many countries of OIC regions. The international tourism receipts were increased from the amount US\$ 15.2 billion in 1990 to 36.1 billion in 2000 at an average annual growth rate of 9.1% which was also higher than the averages of world and other regions¹⁷. However, the relative share was recorded in 2000 in the worldwide tourism receipts accounted for 7.6% with an average annual growth rate of 1.9% since 1990. [Table: 3.10 and Table: 3.11]

In 2001, US\$ 43 billion was generated as international tourism receipts with a growth of 16.2% as compared to last year and gain the share of world market in term of tourism receipts 9.1%. In contrast, world receipts from tourism has earned in US dollar terms 49.7 billion in 2002, 54.2 billion in 2003 and 65 billion in 2004, corresponding to an increase by 18.3%, 9.2%, and 20% respectively throughout the period 2002 to 2004 over the respective previous year and contributed to world's total tourism receipts at 10.3% each year from 2002 to 2003. [Table: 3.10 and Table: 3.11]

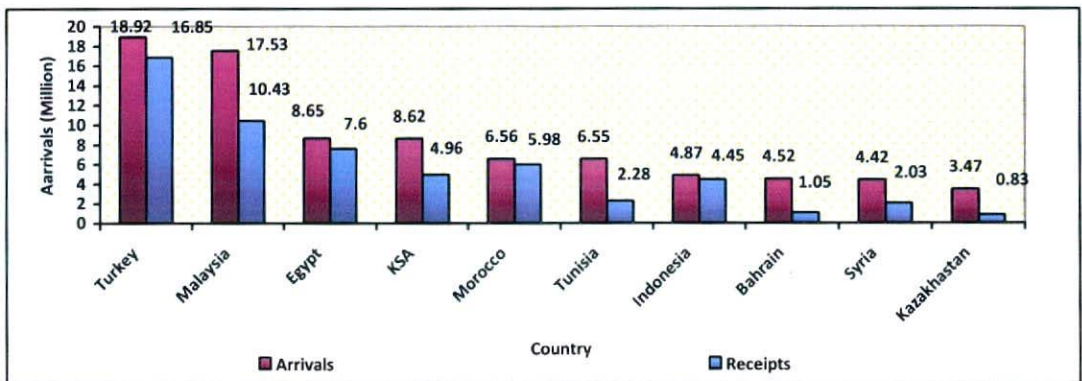
In 2005 and 2006, both years' tourist receipts in OIC countries grew at 8.3% and 5.8% to US\$ 70.5 billion and 74.6 billion respectively over the level of previous year and 10.4% and 10.1% share in the world tourism receipts during the period. [Table: 3.10 and Table: 3.11]

¹⁶ due to unavailability of data for 8 countries during the year (SESRIC, 2008, p.10).

¹⁷ the world average growth rate of the international tourism receipts during the period of 1990-2000 was recorded 6%.

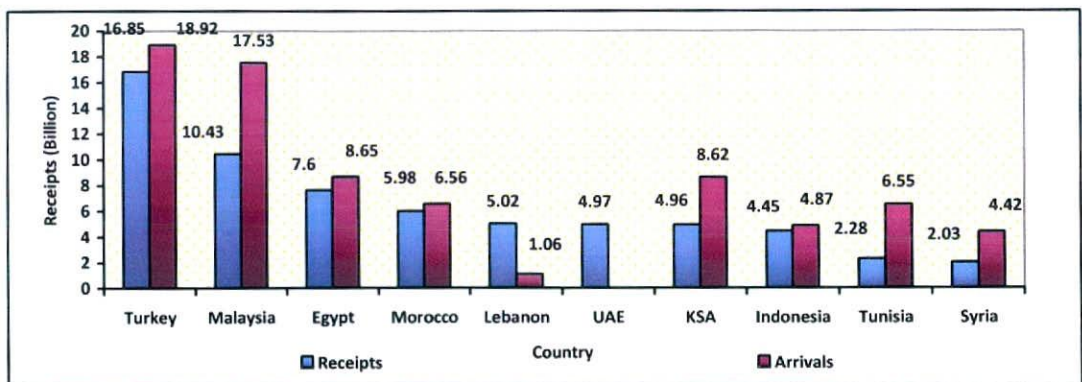
Major tourist destinations and tourism receipts in OIC countries. Turkey, Malaysia, Egypt, Saudi Arabia, Morocco, Tunisia, Indonesia, Bahrain, Syria and Kazakhstan are found the top 10 international tourist destinations in terms of tourist hosted (84.1 million international arrivals) during the period 2006 in OIC region and received 82.5% share of the OIC tourism market. [Table: 3.8]

Figure 3.12: Top Ten Tourism Destinations (Arrivals in Million in 2006) and their Receipts (Receipts in Billion in 2006)



Source: Derived from Table: 3.8 in the Annex.

Figure 3.13: Top Ten Tourism Earners (Receipts in Billion in 2006) and their Destinations (Arrivals in Million in 2006)



Source: Derived from Table: 3.9 in the Annex.

On the other hand, Turkey, Malaysia, Egypt, Morocco, Lebanon, UAE, Saudi Arabia, Indonesia, Tunisia, and Syria are found highest tourism earners during the same period and generated US\$ 64.5 billion as tourism receipts in the region corresponding to a share of 86.5% in the OIC tourism market. [Table: 3.9]

3.3 Tourism in Malaysia

Malaysia has long been one of the world's best kept tourism secret, is positioned between Thailand to the north and Singapore to the south, consists of two geographical regions separated by the South China Sea with a total landmass of 329,845 square kilometers inhabited to its over 25 million population with Muslim 60.4%, Buddhist 19.2%, Christian 9.1%, Hindu 6.3%, and others 4.9% (Census, 2000). Malaysia was successful in diversifying its economy from dependence on exports of raw materials to expansion in manufacturing, services, and tourism.

A Brief Portrait of Malaysia Tourism Industry. Emergence of tourism in Malaysia was almost unidentified until the late 1960s. Since then the government of Malaysia has taken tourism as one of the more traditional sector with a goal of generating foreign exchange, increasing employment, fostering regional and rural development, and diversifying the *country's economic base*. To develop this industry serious and integrated effort were only started in the middle of the 1980s immediately after the world economic recession. At this time, tourism has developed into a major sector of the economy¹⁸.

Malaysian government is focusing more than ever on its tourism industry, which could soon become the nation's number-one source of foreign exchange. In particular, the country is developing its *hitherto overlooked eastern peninsula*, as well as several of its

¹⁸ the second largest foreign exchange earner after manufacturing.

island destinations. Already tourists come to Malaysia to tour different attractions for its distinct tourism product (Sadi and Bartels, 1997).

Alongside, numerous efforts have been reinforced by the concerned organizations to promote the growth of international and domestic tourism. Nevertheless, the *Malaysia Fest and Shopping Carnivals, Malaysia Airlines, and Malaysian Association of Tour and Travel Agents (MATTA)* have developed many attractive domestic holiday packages.

Attractions. Malaysia is an ideal tourism destination in so many different respects as it offers a wide variety of attractions to suit all tastes at relatively affordable prices that can meet the expectations of a broad range of tourists. Perhaps one of the country's greatest assets, Malaysian population is a group of different races comprising three main groups— Malays, Chinese and Indian with more than 80 different languages. The country has some of the finest beaches to be found in the region including nearly 700 kilometers of almost deserted coastline on the east coast of Peninsular. The most popular and well-established region in the country for tourism, apart from Kuala Lumpur the capital, is the island of Penang, which attracts sun and beach tourists as well as those interested in Malaysian colonial heritage. The new, favorite sun and beach holiday spot, meanwhile, is Langkawi Island, seen by many as a showcase for sustainable tourism development, and Sabah and Sarawak are gaining in popularity as adventure travel destinations. Historical buildings in Meleka, Kuala Lumpur, and Penang have been restored and are being promoted as tourist attractions. More recent landmarks of interest to tourists are the Petronas Twin Towers (the world tallest building), the Shah Alam Mosque, the Bukit Jalil Commonwealth Sports Complex, and shopping complexes such as Sunway Pyramid, Kuala Lumpur City Center, and the mall (Musa, 2000). Meanwhile, the World Tourism Organization ranks Malaysia as the third most popular destination in the Asia Pacific region in terms of international tourist arrivals.

The factors contributing Malaysian potential as a Muslim destination are: (a) well developed infrastructure and state of the art facilities, (b) rich cultural diversity, (c) safe

destination– free from terrorism and threats, **(d)** value for money destination, **(e)** “Feel at Home” reception at KLIA and other ports– special immigration lane for family, Malaysia Airports Berthed (MAB) signage in Arabic¹⁹, **(f)** friendly reception and supporting role by front liners, taxi drivers, hotel staff, and other industry components, **(g)** *availability of Halal food* and Muslim country status– brochures and Posters e.g. Halal Food Directory and Muslim tour packages promoting suitable destinations, **(h)** availability of prayers facilities and direction of Kiblah at suitable place of interest, **(i)** special events and activities in conjunction with Ramadan, and **(j)** total support from industry players including travel agents, tour operators, airlines, media, corporate, and government agencies (Wahab, 2009).

Getting into and roaming around. Kuala Lumpur International Airport (KLIA) is Malaysian main international airport²⁰. It is linked to the capital via a toll highway and an express rail link²¹ with the Kuala Lumpur Sentral (KLS) transportation hub, 57 kilometers apart. Malaysia has many others international airports including Penang, Pulau Langkawi, and Johor Bahru in Peninsular Malaysia, as well as, Kuching in Sarawak and Kota Kinabalu in Sabah although KLIA is the primary air gateway. On the other hand Bintulu, Kota Kinabalu, Kuantan, Kuching, Kudat, Labuan, Lumut, Miri, Pasir Gudang, Port Dickson, Port Kelang, Sandakan, Sibul, Tanjung Berhala, and Tanjung Kidurong are the main ports and harbors in Malaysia. Malaysia also connected to different parts of the world by many reputed airline operators.

Tourist accommodation expanded rapidly in Malaysia during the 1990s. The Tourism Development Corporation registered some 990 tourist accommodation establishments providing around 45,000 rooms in 1990. Five years later in 1995, the number of establishments had increased by 23% to 1,220 with the room supply increasing by 70%

¹⁹ announcement in Arabic, Arab speaking staff at counters.

²⁰ situated in Sepang district, in the south of the state of Selangor, about 50 km from the capital city, Kuala Lumpur.

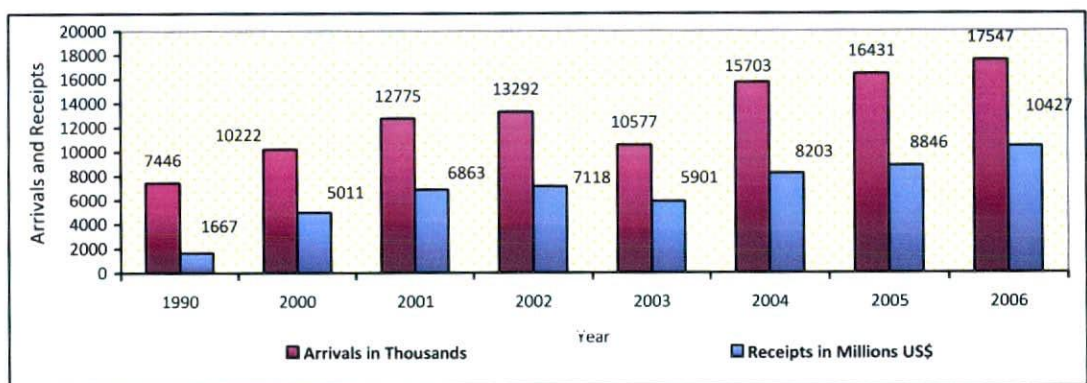
²¹ the Express Rail Link is a standard gauge and electrified railway line in Malaysia.

to 76,373 rooms. Tourism Malaysia recorded more than 1,500 establishments in 2000 offering 124,800 rooms. In 2002, Tourism Malaysia recorded nearly 1,900 establishments providing more than 136,500 rooms.

International tourist arrivals and tourism receipts. In the wake of the first Gulf War of 1991, Malaysian international tourist arrivals fell by more than a quarter. Statistics indicate international tourist arrivals figures have more than doubled in the *ten years to 2002*. This has not been a smooth transition as 1997 and 1998 witnessed substantial declines in international arrivals during the *East Asia Financial Crisis*. This was accompanied by the return of the notorious haze as fires started by Malaysian farmers clearing jungle²².

Over the last decade, the number of international tourist arrivals in Malaysia increased from about 7,446 thousands in 1990 to 10,222 thousands in 2000, corresponding to an average annual growth rate of 3.73%. In the same period international tourism receipts increased from US\$ 1,667 million to US\$ 5,011 million, equivalent to an average annual growth rate of 20.06%. [Table: 3.12]

Figure 3.14: International Tourist Arrivals in Malaysia during 1990 to 2006

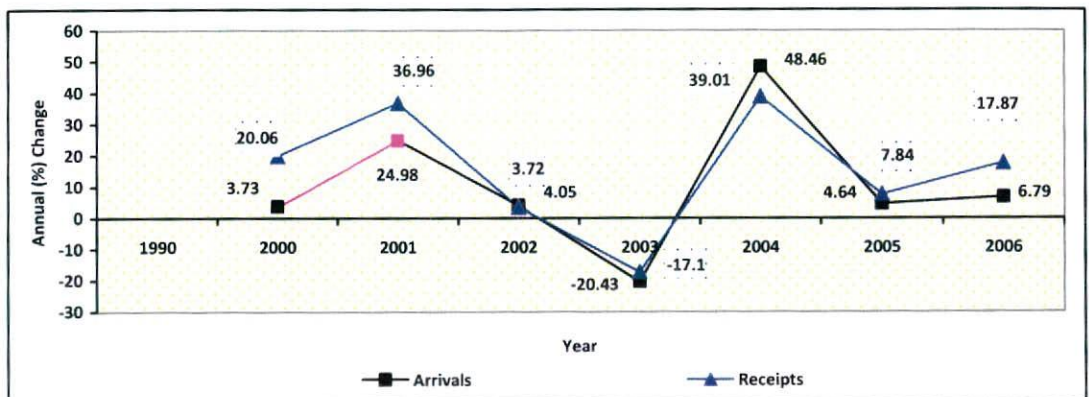


Source: Table: 3.12 in the Annex.

²² burned out of control sending smoke over Singapore, Malaysia and even Southern Thailand.

The number of international tourist arrivals in Malaysia in 2001 amounted to 12,775 thousands, corresponding to an increase by 24.98% in 2001 over the year 2000 and generated US\$ 6,863 million as international tourism receipts, corresponding to an increase by 36.96%. [Table: 3.12]

Figure 3.15: International Tourist Arrivals and Tourism Receipts in Malaysia (Annual % Change) during 2000 to 2006



Source: Table: 3.12 in the Annex.

In 2002, the number of international tourist arrivals in the country, amounted to 13,292 thousands with a annual growth rate of 4.05% over the previous year and international tourism receipts in the same year amounted to US\$ 7,118 million, corresponding to an increase by 3.72% over the year 2001. [Table: 3.12]

Tourists have been deterred by natural disasters, such as tsunamis, and forest fires, as well as the threat of avian influenza. In 2003, the number of international arrivals in the country decreased by 20.43% to 10,577 thousands and international tourism receipts in the country amounted to US\$ 5,901 million, corresponding to a decline by 17.10% over 2002. [Table: 3.12]

The year 2004, the country reached 15,703 thousands arrivals, corresponding to an increase by 48.46% over the previous year and international tourism receipts amounted

to US\$ 8,203 million in the same year, corresponding to an increase by 39.01% over 2003. [Table: 3.12]

In 2005, the number of international tourist arrivals in the country grew by 4.64% to 16,431 thousands and international tourism receipts amounted to US\$ 8,846 million in the same year, corresponding to an increase by 7.84% compared to the last year. [Table: 3.12]

The year 2006 was unquestionably better than ever in the industry. The data available for 2006 show that the number of international tourist arrivals in Malaysia increased by 6.79% to 17,547 thousands. In contrast, Malaysia reached US\$ 10,427 million in 2006 as international tourism receipts, corresponding to a decrease by 17.87% over the level of 2005. [Table: 3.12]

The major markets for Malaysian tourism are mostly from the ASEAN (Association of Southeast Asian Nations) region, followed by the Far East, Australia, and the UK markets. For instance in 2006, out of 17.547 million arrivals, the four major ASEAN countries namely Singapore, Thailand, Indonesia, and Brunei had contributed to more than 77%, followed by China, Japan, Australia, United Kingdom, India, and the United States of America which contributed slightly above 10%. In order to diversify the economy, the government is trying hard to further stimulate the growth of the tourism industry (Salleha and Othmanb, 2008). In contrast, International tourist receipts have been growing at greater rates than increasing international arrivals in recent years.

Human resource development and employment issues. Different action plans have been taken to promote a positive image of the tourism industry as a provider of jobs and career opportunities for all Malaysians²³ and to take the advantages of tourism's

²³ young people, first-time job seekers, minority groups and women looking for part-time employment etc.

potential to provide jobs. It is recognized that tourism employment in Malaysia is concentrated in small businesses and local communities throughout the country and across the whole employment spectrum. *To improve skills a number measures has been placed in the action plan, like education and training at the forefront of tourism development, introducing it in the high-school curricula etc.*

Tourism accounts for a significant share of Malaysian total employment. Yet, given the relatively modest growth in jobs forecast over the next nine years– 2.9% per annum for jobs directly in the industry and 2.5% for jobs throughout the tourism economy– the available workforce is unlikely to be able to keep up with tourism demand. The situation could be exacerbated by the low unemployment in Malaysia and the fact that tourism jobs are perceived as being poorly paid (Prosser, 2002).

Tourism policy. The government has been playing a significant role to stimulate the growth and development of the tourism industry by allocating substantial funds to the promotion of tourism and provision of infrastructure. After the severe recession in the mid 1980's the government has given a very high priority to the development of the tourism industry. In 1987 as a part of this seriousness in promoting the tourism industry, the government had established the Ministry of Culture, Arts and Tourism and later upgraded it to the Ministry of Tourism in 2004 *to manage, monitor, synchronize, and ensure all tourism development activities and programs in line with the National Tourism Master Plan* (Salleha and Othmanb, 2008) which was assigned to take care of, coordinating and implementing government policies and strategies pertaining to tourism development. National Economic Recovery Plan (NERP) drawn up in 1998 identified tourism as *a key sector for the country's future economic growth* and, therefore, deserving of increased government attention.

To further promote tourism, various tourism-related agencies at the state level were also set up, besides having some promotional activities such as the *declaration of Visit*

Malaysia Year' (VMY) in the 1990's, 2000, and 2007, and active participation of the private agencies (Salleh and et.al, 2008). At the same time, various attractive incentives and assistance were given to private operators to encourage them for developing public-private sector partnerships in the industry.

Since the mid-1980s and the decision to allocate a high priority to tourism, the Malaysian Government has been increasingly generous with its budgets for marketing and promotions especially to encourage heritage and nature-based tourism enterprises.

The government has also established a National Tourism Development Plan in consultation with state and local governments and the private sector to spread the benefits of tourism to all parts of the country and to all stakeholder as well as to monitor trends in tourism demand so as to anticipate and adapt products to changing demand and to focus on market and product diversification in order to reduce the heavy dependence on traditional markets and to increase yield.

In recent times, the Government of Malaysia approved the setting-up of the Islamic Tourism Center (ITC) as a leading center to provide strategic market research inputs for policy formulation in the development and promotion of sustainable tourism in Malaysia with the objectives of: (a) to serve as a focal point for tourism strategic research, (b) to undertake tourism research projects, (c) collaborate with other tourism research institutes and institutes of higher learning at home and abroad, (d) to provide capacity building, (e) to undertake information exchange, and (f) to facilitate in tourism study visits. ITC is committed to serve the government and other stakeholders by providing an objective and impartial understanding of the tourism issues on national, regional, and global importance and to promote goodwill among the Muslims people via tourism (Wahab, 2009).

Malaysia Tourism Promotion Board (MTPB), more often known as Tourism Malaysia, is responsible for the implementation of tourism policy as well as the development and promotion of the industry. It is a 100% subsidiary of, and fully financed by, government and reports to the Ministry of Culture, Arts, and Tourism. A three-pronged strategy was drawn up by the MTPB to boost arrivals and earnings from tourism: **(a)** go after markets not affected by the Asian economic crisis, such as China, India, the Middle East, and Europe, **(b)** go after neighboring markets, namely Singapore, Thailand, Hong Kong, Malaysia, and Japan, and **(c)** develop domestic tourism.

However, tourism sector of Malaysia also *contributes to regional development, encourage the development of supporting sectors, and reduction in rural-urban migration.*

3.4 Tourism in Indonesia

Indonesia is a group of islands consisting of 17,508 islands. The islands lie in the eastern part of Indian Ocean and southern part of Pacific Ocean and the sea area is four times greater than its land area (1,919, 440 square kilometers) which is about 1.9 million square kilometers. Out of 17,508 islands in the country, 6,000 of which are inhabited (IMF, 2006) to its over 238 million population with nearly 200 million Muslim²⁴ and the rest Christian and others. The archipelago of Indonesia spans 5,120 kilometers across the equator, positioned between the Asian and Australian continents.

A Brief Portrait of Indonesia Tourism Industry. Tourism in Indonesia is the activity of selling the beauty of nature and the unique culture. Tourism in the country is being developed through two main programs: **(a)** covering tourism, and **(b)** tourism products with *five supporting programs* namely: **(a)** control of environmental pollution, education, training, **(b)** tourism guidance, **(c)** tourism research and development, **(d)**

²⁴ about 88% of the population.

tourism infrastructure development, and (e) the supervision and development of arts and culture.

The manufacturing sector began to expand rapidly in the mid 1980s and by 2006 accounted for 28% of GDP. After completing the phase of developing its secondary (manufacturing) industry, the country moved forward to tertiary (service) industry. More recently, the services sector has grown, boosted by the travel and tourism industry. In 2006, it accounted for over 40% of GDP and employed nearly 38% of the working population (BI, 2005). Relying on this concept on the early 1990s, Indonesia promoted the development of service industries. The most prominent sector in this industry is tourism.

Tourism has played an important role in some provinces in Indonesia. The province of Bali, for example, enjoyed revenues from tourism even before the *Government of Indonesia gave its attention to this sector*. In order to promote the tourism industry, the country established a Ministry of Tourism, Post and Telecommunication in 1988, and set a “Visit Indonesia Year 1990” program.

Attractions. Bali—Indonesia's most popular, and most commercialized destination, Java—the most impressive architectural legacies of the Hindu and Buddhist empires, Sumatra—rich in nature and rainforest, Lombok—entices visitors with its coastal attractions, and other attractions—include the volcanoes of Gunung Sinabung and Gunung Sibayak, the Gunung Leuser National Park²⁵, and Indonesia Lake Toba²⁶.

Getting into and roaming around. As a large country made up of many islands, Indonesia faces considerable challenges in establishing the extensive infrastructure of all modes of transport, communications and public utilities that are an essential

²⁵ covering 7,927 km² in northern Sumatra.

²⁶ 100 km long and 30km wide, and 505m at its deepest point, in the middle of the northern part of the Indonesian island of Sumatra with a surface elevation of about 900m.

prerequisite for its economic and social development. The necessity of creating such an infrastructure has long been recognized by policy makers in Indonesia.

Soekarno-Hatta Airport in Jakarta and Ngurah Rai Airport²⁷ in Bali traditionally the principal ports of arrival. Garuda Indonesia is the Indonesia's national carrier operates to 30 domestic and 24 international destinations. Code share alliances with Silk Air, China Airlines, Malaysian Airlines, Philippine Air Lines (PAL), and Qatar Airways are linking 81 international destinations. Land transport depends principally on road and to a lesser extent, rail networks.

Indonesia's accommodation capacity, particularly in the hotels sector, is heavily concentrated across a few provinces with Bali, Jakarta and West Java. Sahid Hotels is one of Indonesia's major hotel groups²⁸ and the other big player is the Hotel Santika Indonesia Group²⁹. Santika is currently planning expansion into Lombok, Medan, Anyer, Solo, and Malang. In total there are 11,461 hotels, with 285,530 rooms and 465,021 beds. For the country as a whole, room occupancy was just 45% at end-2006.

International tourist arrivals and tourism receipts. The spectacular increases in tourism arrivals in the first half of the 1990s were tempered during the final years of the decade. During the ten-year period from 1985 through 1994, Indonesia's annual tourism arrivals grew from 749,400 to 4,006,300 at an average annual growth rate of 19.3%. However, a combination of SARS, terrorism, and shrinking long-haul markets have combined to cause stagnation.

Over the last decade, the number of international tourist arrivals in Indonesia increased from about 2,178 thousands in 1990 to 5,064 thousands in 2000, corresponding to an

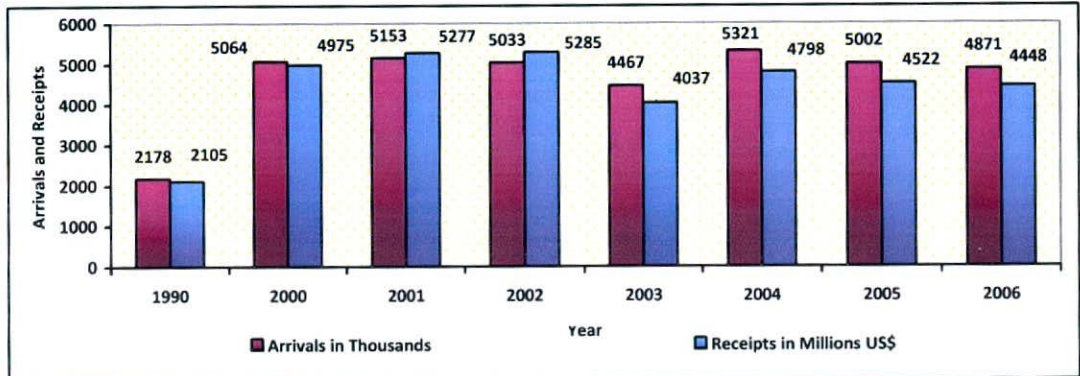
²⁷ also known as Bali International Airport. It is Indonesia's third-busiest international airport, after Jakarta's Soekarno-Hatta International Airport.

²⁸ with 20 properties amounting to a capacity of 4,512 rooms across the country.

²⁹ 11 hotels and 1,333 rooms.

average annual growth rate of 13.25%. In the same period international tourism receipts increased from US\$ 2,105 million to US\$ 4,975 million, equivalent to an average annual growth rate of 13.63%. [Table: 3.13]

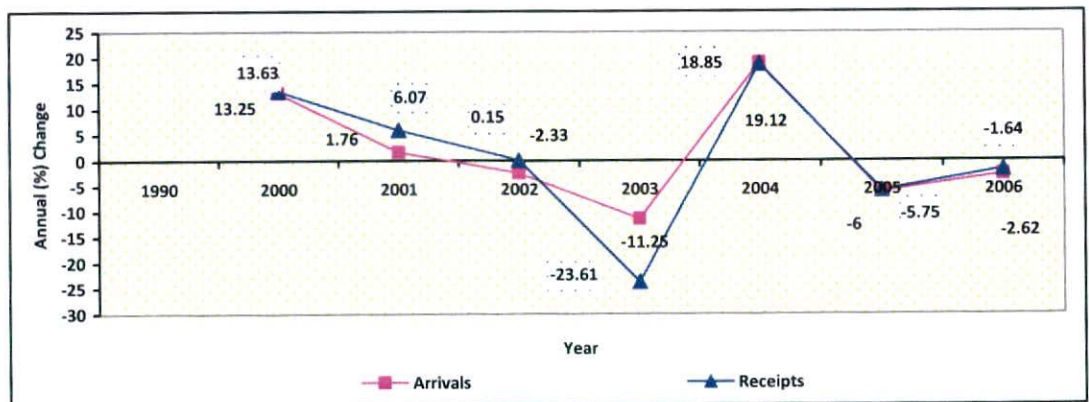
Figure 3.16: International Tourist Arrivals in Indonesia during 1990 to 2006



Source: Table: 3.13 in the Annex.

The number of international tourist arrivals in Indonesia in 2001 amounted to 5,153 thousands, corresponding to an increase by 1.76% in 2001 over the year 2000 and generated US\$ 5,277 million as international tourism receipts, corresponding to an increase by 6.07%. [Table: 3.13]

Figure 3.17: International Tourist Arrivals and Tourism Receipts in Indonesia (Annual % Change) during 2000 to 2006



Source: Table: 3.13 in the Annex.

In 2002, the number of international tourist arrivals in the country, amounted to 5,033 thousands with a annual growth rate of -2.33% over the previous year and international tourism receipts in the same year amounted to US\$ 5,285 million, corresponding to an increase by 0.15% over the year 2001. [Table: 3.13]

Tourists have been deterred by natural disasters, such as earthquakes, tsunamis, and forest fires, as well as the threat of avian influenza and the risk of further terrorist attacks. In 2003, the number of international arrivals in the country decreased by 11.25% to 4,467 thousands and international tourism receipts in the country amounted to US\$ 4,037 million, corresponding to a decline by 23.61% over 2002. [Table: 3.13]

The year 2004 was unquestionably better than ever in the industry, the country reached 5,321 thousands arrivals, corresponding to an increase by 19.12% over the previous year and international tourism receipts amounted to US\$ 4,798 million in the same year, corresponding to an increase by 18.85% over 2003. [Table: 3.13]

In contrast, it seems that international tourism in Indonesia was affected in 2005. Therefore, the number of international tourist arrivals in the country decreased by 6% to 5,002 thousands and international tourism receipts amounted to US\$ 4,522 million in the same year, corresponding to a decrease by 5.75% compared to the last year. [Table: 3.13]

The data available for 2006 show that the number of international tourist arrivals in Indonesia still in the declined trend, decreased by 2.62% to 4871 thousands. In contrast, Indonesia reached US\$ 4,448 million in 2006 as international tourism receipts, corresponding to a decrease by 1.64% over the level of 2005. [Table: 3.13]

Human resource development and employment issues. The government of Indonesia is aware that there remain challenges to address *human resources development along*

with infrastructure development and mastering the technology, and balancing the distribution of economic development throughout the country. WTTC estimated that the number of tourism jobs grew in 2004 after a difficult start to the millennium. Tourism's share of employment has gained importance accordingly (IMF, 2005), but the WTTC's belief that the sector can account for almost one in ten jobs during the next decade will be strongly challenged by the difficulties facing the organized travel industry in the immediate aftermath of the tsunami and recent earthquake.

Tourism policy. The *Government is heavily involved in the tourism industry*. It owns the main domestic and international airline as well as another large airline, Merpati. It is also involved in travel agencies and local hotel groups. The Government is involved in promoting tourism under several themes in parallel with the effort to improve Indonesia as the one of the most varied destinations. As stated in the National Tourism Strategic Plan, the vision of stakeholders in Indonesian tourism development is to achieve a tourism capability that strengthens national identity and unity, increases the nation's well being and promotes friendship among nations³⁰. The promotion of tourism is complex, involving a number of bodies and stakeholders, although the Indonesian Culture and Tourism agency has overall control.

The Tourism Ministry's *marketing drive* in 2004 was launched under the banner of '*The Most Varied Destination Anywhere*', and it may prove useful as the authorities seek to remind potential visitors that there is more to Indonesia than Northwest Sumatra. Whilst emphasizing the cultural and geographical diversity inherent in a land of over 300 ethnic groups, special emphasis has been placed upon Indonesia's stature.

³⁰ the plan recognizes that tourism is also a source of increasing stress on fragile ecosystems and culture environment because it concentrates on vulnerable natural and cultural sites. For the last few years, the development of cultural tourism in Indonesia has focused away from the mass tourism approach to the special interest approach, which generally involves "three pillars of sustainability": ecologically and environmentally friendly, socio-culturally friendly, and economically efficient.

The Indonesian government now fully realizes the value of tourism to the economy. In February 2005, an unprecedented cabinet-level meeting was held in Bali which brought together cabinet members and representatives from the Intelligence Bureau, the police, cultural envoys and tourism associations in a bid to form a framework for the development of the country as a cultural and tourism destination.

The meeting generated seven points of recommendations: **(a)** a positive thinking campaign, **(b)** promoting national identity through colossal, **(c)** marketing Indonesia as an international movie/film-making location, **(d)** establishing a National Cultural Development Center, **(e)** achieving the targeted number of tourist visits, **(f)** intensifying domestic tourism, and **(g)** revitalization of tourism industries outside Java and Bali regions.

National policy on development of tourism is based on a *long-term plan of development*. During the last 32 years, a centralized development policy, including the tourism, was adopted. As a result, many provinces of Indonesia were not optimally and equally developed. The growth of tourism had been lower than that of neighboring countries in ASEAN, a surprising fact when taking into account the richness of Indonesia's tourist attractions.

Recent development shows increasing efforts by the *central government to work together with the local government* to identify, develop and promote potential tourist destinations other than Bali. Along with the increasing awareness of nature protections, which will attract special tourists to visit Indonesia, the government has also introduced regulations on environment which are related to the sector of tourism, such as: **(a)** The Decree of the Minister of the Environment regarding Proper Clean River Program, **(b)** The Decree of the Minister of the Environment, on Standard Quality of Liquid Wastes for Hotel Operations, **(c)** The Decree of the Head of Environment Control Institution regarding Clean River Program, to require hotels to install liquid waste management

unit, (d) Memorandum of Understanding (MOU) between the Ministry of the Environment and Indonesian Association of Hotels and Restaurants concerning the training and monitoring of environmental-friendly hotels and restaurants, and (e) Programs on Evaluating the Achievements of Business Entities in implementation of Clean River Program. Implementations of those regulations include the effort to apply environmentally friendly standards for the operations of hotels in Indonesia.

After several years, private tourism sectors as well as the government realized that the development of tourism in this country is not only beneficial but has also its negative impact, such as: environmental degradation, economic gap between those related to the tourism business and those who are not, cultural degradation, etc. Massive development of high rise hotels, roads and infrastructures, along with changing use of the land, etc. for the purpose of tourism, have resulted the *serious degradation of the environment*.

As tourism developed, profit-seeking investors have come. Their fresh capital enabled them to own most of the resources, and eventually expel the local community from their own land. This left them with choices of either stay as farmers in less-fertile and smaller size of lands, or taking other jobs such as small merchants, providing services to the tourism activities, etc.

Under the pressure of Indonesian NGOs, informal leaders, religious leaders and other concerned people, the government of Indonesia has started to change its policies on tourism. The government has put its best efforts in *promoting people-centered tourism and ecologically friendly tourism*.

Unlike the previous ones, the new policies provide more opportunities for the local people to participate in the tourism development. Under the "tourism build prosperity and peace" theme, the Government of Indonesia *empowers small and medium scale*

entrepreneurs and cooperatives in tourism sector, encourages private— especially the small and medium ones, deregulates licensing process for eliminating high-cost economy, and implements community based tourism.

Environmentally friendly tourism, or eco-tourism, has been adopted in the last five years. It, as a matter of fact, has not been a mainstream in the tourism development. Only some areas— consist of national parks, rivers, and forests— are designated to be used for eco-tourism. In developing eco-tourism it is understood that eco-tourism should make requirements of nature and environmental protection the basis for touristic activities. Thus, it ensures its ecological sustainability.

3.5 Tourism in Maldives

Tourism is essential to many places around the world. The Maldives have one of the highest sea levels in relation to the land, and as such are very close to being completely submerged. Maldives is a group of coral islands³¹. The islands lie in the northern Indian Ocean and the sea area is approximately 107,500 square kilometers. There are some 1,200 islands in the country, 202 of which are home to its over 309 thousands population (UNS, 2009), while the other islands are used entirely for economic purposes of which tourism and agriculture are the most dominant. The archipelago is 823 kilometers long and 130 kilometers at its greatest width. The islands are formed into 26 natural atolls but they are divided into 19 administrative regions.

A Brief Portrait of Maldives Tourism Industry. Tourism industry plays an important role for Maldives' economic development. So the country welcomes more tourists, especially from China, as the number of Chinese tourists travelling to Maldives has been steadily increasing. Tourism began in the Maldives relatively late. The Maldives was largely terra incognita for tourists until the early 1970s. A United Nations mission on development

³¹ the shortest distance from the mainland of India is 350 km and from Sri Lanka 740 km.

which visited the Maldives Islands in the 1960s did not recommend tourism, claiming that the islands were not suitable. Ever since the launch of the first resort in Maldives in 1972, however, tourism in Maldives has flourished. The arrival of the first tourist group is estimated to have occurred in February 1972. The group landed at Malé, the capital island of the Maldives, and spent 12 days in the country. Tourism in Maldives started with just two resorts with a capacity of about 280 beds in Kurumba Village and Bandos. At present, there are over 80 resorts located in the different atolls constituting the Republic of Maldives. Over the past few decades, the number of tourists in Maldives has risen continuously. Today, more than 600,000 tourists visit the Maldives each year. In this day and age, Maldives is famous for its natural beauty which includes the blue ocean and white beaches, accompanied by clean air and pleasant temperatures. The climate of the Maldives is ideal for visitors to get engaged in water sports such as swimming, fishing, scuba diving, snorkeling, water-skiing and windsurfing. Due to its extraordinary underwater scenery and clean water, Maldives is ranked among the best recreational diving destinations of the world (Garrod and Gossling, 2007).

Getting into and roaming around. Tourism in Maldives provides excellent facilities in and around Maldives in order to make the visit to Maldives Pleasant. It includes (a) package tours, (b) accommodations— deluxe hotels, first class hotels, economy hotels, budget hotels, and others, (c) transport, (d) guides, (e) escorts, and (f) Porters etc.

More or less all visitors arrive by air to the Malé International Airport³², Maldives. There are regular flights to Sri Lanka, Southwest India, UAE, and Malaysia, in addition to many chartered flights from European centers. Visitors are normally met on arrival at the airport and transferred by boat, helicopter or seaplane to the resort island of their choice³³. In general, a high standard transport and communication services are provided

³² situated in Hulhule Island— about ten minutes (just over a kilometer) by boat from Malé, the capital.

³³ with confirmed reservations.

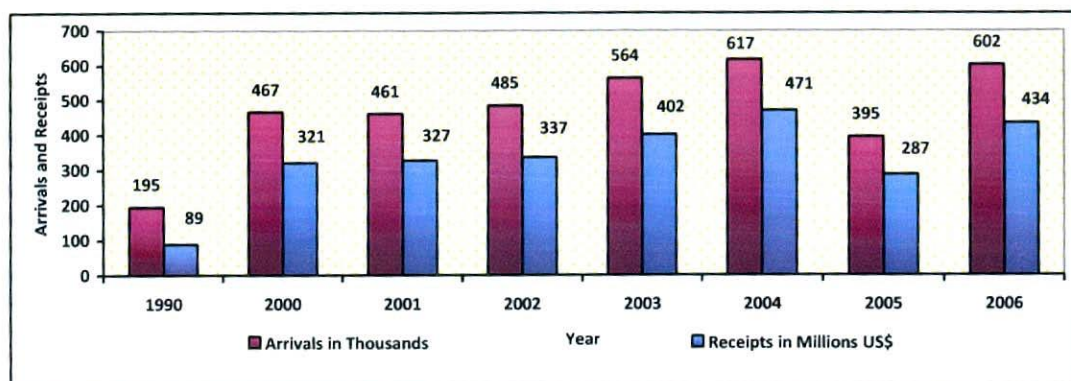
for tourists. There is no regular inter-island transportation system between inhabited islands.

Foreign investment is common in the tourism industry of Maldives. In the early days the country had a relaxed policy to attract investments. This has facilitated private sector involvement and rapid growth in the sector based on market forces. All the islands used as resorts are leased by the government for private individuals or companies. Multinational companies and hoteliers like Hilton Hotels, Club Med, Four Season, and One and Only etc. run and manage resorts in the Maldives today.

International tourist arrivals and tourism receipts. The Maldives rely heavily on tourism for their economy as it is not a thriving country by any means. Money from this industry can be put towards preventing the islands from being submerged. Tourism is the largest economic industry in the Maldives³⁴, as it plays an important role in earning foreign exchange revenues and generating employments in the tertiary sector of the country. The archipelago of the Maldives is the main source of attraction to many tourists visiting the country worldwide.

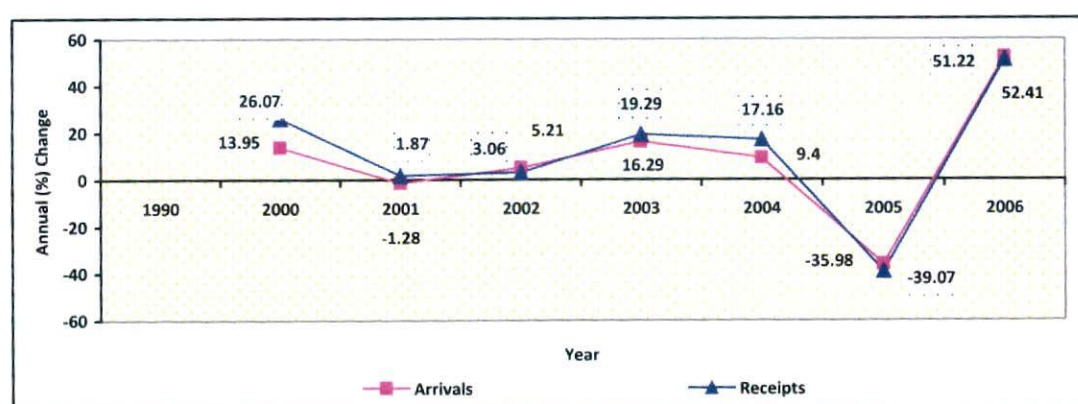
Over the last decade, the number of international tourist arrivals in Maldives increased from about 195 thousands in 1990 to 467 thousands in 2000, corresponding to an average annual growth rate of 13.95%. In the same period international tourism receipts increased from US\$ 89 million to US\$ 434 million, equivalent to an average annual growth rate of 26.07%. [Table: 3.14]

³⁴ tourism accounts for 28% of GDP and more than 60% of the Maldives' foreign exchange receipts. Over 90% of government tax revenue comes from import duties and tourism-related taxes.

Figure 3.18: International Tourist Arrivals in Maldives during 1990 to 2006

Source: Table 3.14 in the Annex.

The number of international tourist arrivals in Maldives in 2001 amounted to 461 thousands, corresponding to a decrease by 1.28% in 2001 over the year 2000 and generated US\$ 327 million as international tourism receipts, corresponding to an increase by 1.87%. [Table: 3.14]

Figure 3.19: International Tourist Arrivals and Tourism Receipts in Maldives (Annual % Change) during 2000 to 2006

Source: Table: 3.14 in the Annex.

In 2002, the number of international tourist arrivals in the country, amounted to 485 thousands with a annual growth rate of 5.21% over the previous year and international

tourism receipts in the same year amounted to US\$ 337 million, corresponding to an increase by 3.06% over the year 2001. [Table: 3.14]

Consequently in 2003, the number of international arrivals in the country increased by 16.29% to 564 thousands. Yet, international tourism receipts in the country amounted to US\$ 402 million, corresponding to an increase by 19.29% over 2002. [Table: 3.14]

The year 2004 was unquestionably better than ever in the industry, the country reached 617 thousands arrivals, corresponding to an increase by 6.40% over the previous year and international tourism receipts amounted to US\$ 471 million in the same year, corresponding to an increase by 17.16% over 2003. [Table: 3.14]

In contrast, it seems that international tourism in Maldives was fairly affected in 2005 by the negative factors of internal political and social turbulence as well. Therefore, the number of international tourist arrivals in the country decreased by 35.98% to 395 thousands and international tourism receipts amounted to US\$ 287 million in the same year, corresponding to a decrease by 39.07% compared to the last year. [Table: 3.14]

The current available data for 2006 show that the number of international tourist arrivals in Maldives recovered the downward trend, increased by 52.41% to 602 thousands. In contrast, Maldives reached US\$ 434 million in 2006 as international tourism receipts, corresponding to an increase by 51.22% over the level of 2005. [Table: 3.14]

Human resource development and employment issues. The development of tourism has fostered the overall growth of the country's economy. It has created direct and indirect employment and income generation opportunities in other related industries. Workers in the tourism industry are represented by the Tourism Employees Association of Maldives (TEAM). The association argues the 25,000 workers employed in the

industry face poor conditions and have very low wages³⁵. The lack of any constructive works done in the development of the human resources, protection of the rights of tourism workers, and the fundamental human rights of the workers in the tourism industry were noted with displeasure by the association (TEAM, 2009). Government has failed to do any work in adequately developing human resources for the tourism sector over the past 30 years. The standard of the courses offered at the Faculty of Hospitality and Tourism Management has not been improving and there is no independent body to verify the standard of education offered at the faculty. The faculty does not offer any certificates accredited by an internationally recognized body in its 20 years history.

Tourism policy. The industry now is very much regulated by the Government of Maldives. Tourism is now developed and *managed according to country wide policy based on a master plan*. This task is carried out by the Ministry of Tourism. The ministry in the light of their development plan decides how many beds will be allocated in the country for tourists in a given period.

The broad objectives of Tourism Master Plan (1996-2005) are to: **(a)** extend the economic benefits of tourism to island populations located away from traditional tourism centers, **(b)** diversify the Maldives' tourism product, **(c)** diversify the income and job generating markets and reduce dependence on just a few markets, **(d)** emphasize human resource development with the aim of reducing dependence on foreign labor, **(e)** increase bed capacity to reach 20,000 beds, and **(f)** develop complementary services, i.e., airport capacity and facilities, transfers, marketing (Riza, 2002).

The Maldives Tourism Act 1999 has repealed the earlier version of which was introduced in 1979, the number 15/79 (Law on Tourism in the Maldives) and Act No. 3/94 (Law on Leasing of Uninhabited Islands for the Development of Tourist Resorts). This Act provides for the *determination of zones and islands for the development of tourism* in

³⁵ between US\$ 80 to US\$ 235 monthly.

the Maldives: **(a)** *the leasing of islands for development as tourist resorts*, **(b)** the leasing of land for development as tourist hotels and tourist guesthouses, **(c)** the leasing of places for development as marinas, **(d)** the management of all such facilities, and **(e)** the operation of tourist vessels, diving centers and travel agencies, and the regulation of persons providing such services (MTA, 1999).

The government of Maldives aims to conserve the natural beauty of the islands before they are being altered into resorts by enforcing laws such as prohibition of catching turtles and reduction in the damages caused to the coral reefs. Furthermore, some *promotion of ecotourism is practiced* in the Maldives, with resorts emphasizing recycling of heat that is wasted in producing electricity and stricter policies of waste disposal (Fennell, 2008). Nevertheless, the Maldives have frequently come under criticism for their lack of protection of the local shark populations, which have sharply decreased after being hunted extensively for decades. In some areas of the island, sharks have entirely disappeared. Sharks are hunted primarily for their fins. Shark fins are exported from the Maldives to other countries in Asia, where they are regarded as a delicacy. The fins are amputated from the live animals, which are then thrown back alive into the sea. Although laws exist that prohibit this practice in the Maldives, these laws are not respected or enforced by the local authorities (Geschke, 2008).

3.6 Tourism in Azerbaijan

Azerbaijan is a Turkic Muslim state in the Caucasus of Southeastern Europe and Asia. Tourism in Azerbaijan is still in its prime because the former communist regime did not allow tourism to become established. In the recent years, Azerbaijan has also becoming a popular destination for religious, spa, and health care tourism (Euro Monitor, 2009).

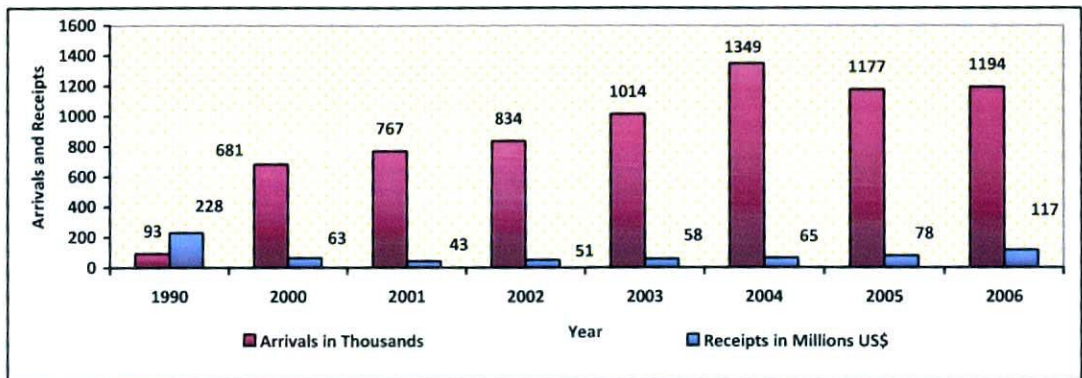
A Brief Portrait of Azerbaijan Tourism Industry. Tourism is a small but increasingly important contributor to the economy of Azerbaijan. The expected growth in tourism will continue to play only a small role in the economy. Tourist receipts are mostly driven by business tourists as Azerbaijan is first and foremost an oil and gas producing country.

Getting into and roaming around. Regular international flights connect Azerbaijan with major destinations in the world. Airlines operate flights to Baku mostly are: (a) Iran Air, (b) Aeroflot, (c) Austrian Airlines, (d) Turkish Airlines, (e) Lufthansa, and (f) Uzbekistan Airways etc. Tourists have many options to move around within the country for covering the distances by taking flights, pleasing train journeys, hiring a taxi, or traveling by buses to all most every destination. National air company Azerbaijan Airlines (AZAL) is the main carrier which flies to few domestic and international destinations. Alongside, few private operators are also operating flights in the country, for instance Turan Air, Silk Way Airlines, and IMair airlines etc.

There are a number of fashionable hotels in Azerbaijan, for instance Sheki Saray, Hyatt Regency, Hyatt Park, Excelsior, Grand Hotel Europe, Radisson SAS Plaza, Holiday Inn, and Ambassador.

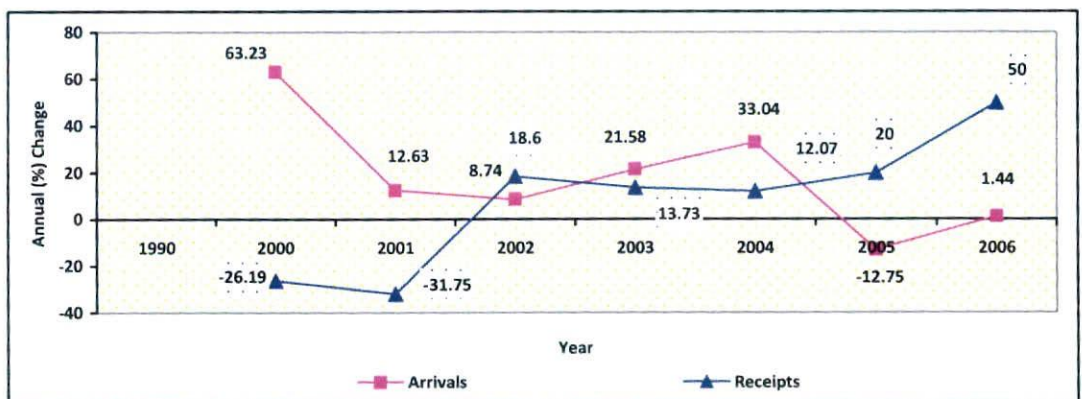
International tourist arrivals and tourism receipts. Over the last decade, the number of international tourist arrivals in Azerbaijan increased from about 93 thousands in 1990 to 681 thousands in 2000, corresponding to an average annual growth rate of 63.23%. In the same period international tourism receipts decreased from US\$ 228 million to US\$ 63 million, equivalent to an average annual growth rate of -26.19%. [Table: 3.15]

The number of international tourist arrivals in Azerbaijan in 2001 amounted to 767 thousands, corresponding to a decrease by 12.63% in 2001 over the year 2000 and generated US\$ 43 million as international tourism receipts, corresponding to a decrease by 31.75%. [Table: 3.15]

Figure 3.20: International Tourist Arrivals in Azerbaijan during 1990 to 2006

Source: Table: 3.15 in the Annex.

In 2002, the number of international tourist arrivals in the country, amounted to 834 thousands with a annual growth rate of 8.74% over the previous year and international tourism receipts in the same year amounted to US\$ 51 million, corresponding to an increase by 18.60% over the year 2001. [Table: 3.15]

Figure 3.21: International Tourist Arrivals and Tourism Receipts in Azerbaijan (Annual % Change) during 2000 to 2006

Source: Table: 3.15 in the Annex.

In 2003, the number of international arrivals in the country increased by 21.58% to 1,014 thousands and international tourism receipts in the country amounted to US\$ 58 million, corresponding to an increase by 13.73% over 2002. [Table: 3.15]

The year 2004 was unquestionably better than ever in the industry. In this year the country reached 1,349 thousands arrivals, corresponding to an increase by 33.04% over the previous year and international tourism receipts amounted to US\$ 65 million in the same year, corresponding to an increase by 12.07% over 2003. [Table: 3.15]

In 2005, the number of international tourist arrivals in the country declined by 12.75% to 1,177 thousands and international tourism receipts amounted to US\$ 78 million in the same year, corresponding to an increase by 20% compared to the last year. [Table: 3.15]

The data available for 2006 show that the number of international tourist arrivals in Azerbaijan increased by 1.44% to 1,194 thousands. In contrast, Azerbaijan reached US\$ 117 million in 2006 as international tourism receipts, corresponding to an increase by 50% over the level of 2005. [Table: 3.15]

Human resource development and employment issues. The government has been arranged *several programs under the authority of Ministry of Youth, Sport, and Tourism for developing the professional education and training of human resources in tourism sector* and the effective use of these human resources to promote tourism in the post Soviet Union period. Many public and private employees have taken part in several of *short-term, long-term, and intensive courses along with overseas courses*. The government has also *arranged long-term cooperation agreement* between the Ministry of Youth, Sport, and Tourism and Turkey to provide appropriate training courses. Furthermore, Austria, Sweden, Egypt, Japan, and other countries have provided tourism opportunities within the tourism sector (Gahramanov, 2004).

Azerbaijan's 32,000 travels and tourism direct industry jobs account for 0.7% of total employment in 2009. The contribution of the travel and tourism economy to employment is 159,000 jobs in 2009, 3.8% of total employment or 1 in every 26.4 jobs (Baumgarten, 2009).

Tourism policy. A number of investment projects has been developed for the growth of tourism in Azerbaijan, for instance: House of Energy and Fire Project³⁶ and Rural Green Tourism Project³⁷ etc. Tourist information centers have already been opened in the regions of Azerbaijan including Baku. This project is financed by UNDP and by the Ministry of Culture and Tourism.

As a part to Azerbaijan's tourism promotion program, *advertisement spots on the leading channels* of the world: **(a)** Cable News Network– CNN, **(b)** Travel Channel, and **(c)** Euro News and aired planned activities in National Geographic Channel for attracting tourist. Alongside, print medias have also been applied in: **(a)** international tourism magazines– Association of British Travel Agents (ABTA), World Travel Guide (WTG), and Travel Trade Gazette (TTG) etc., and **(b)** local press– Azerbaijan Review and Azerbaijan Tourism Newspaper (ATN) etc. Advertising in the magazines and TV-spots on the board of the leading international carriers has also used for the promotion of Azerbaijan's tourism acceleration. The country has also been *participating in different international Tourism Exhibitions* viz. Ferien-Messe Wien International fair for holidays, travel and leisure (Vienna, Austria), Fitur International Tourism Trade Fair (Madrid, Spain), Balttour Expo (Riga, Latvia), World Travel Market– WTM (London, England), Borsa International Tourism Fair– BIT (Milan, Italy), International Tourism Business– ITB (Berlin, Germany), Bahrain International Travel Expo– BITE (Manama, Bahrain), China Outbound Travel and Tourism Market– COTTM (Beijing, China), Outbound Travel Mart– OTM (New Delhi, India), Japan Association of Travel Agents– JATA (Tokyo, Japan), Moscow International Travel Fair– MITF (Moscow, Russia), East Mediterranean International Travel and Tourism– EMITT Exhibition (Istanbul, Turkey), Arabian Travel Market– ATM (Dubai, UAE), Kuwait International Fair–KIF (Kuwait), and Swiss International Holiday Exhibition etc.

³⁶ to a value of \$19,000,000 is carried out by UNDP, Ministry of Culture and Tourism and State Oil Company.

³⁷ technical support of which is provided by the NGO "Agro-Consult" and Ministry of Culture and Tourism, is financed by the Fund "Eurasia".

Meanwhile the Government of Azerbaijan has *implemented state program for the development of tourism* in the country in 2002-2005. The results of the program are: **(a)** improvement of legislation, **(b)** extension of market-oriented activities, **(c)** increase in the level of tourism services, **(d)** development of tourism infrastructure, **(e)** favorable conditions for foreign investments, **(f)** development of human resource management, and **(g)** development of public-private partnerships.

In recent time, the Government again approved another *state program for the period of 2008-2016* on tourism development with the defined principal priority areas: **(a)** establishment of new recreation and tourism zones, **(b)** developing tourism infrastructure in the regions, **(c)** working out new tourism law, **(d)** increasing number of tourism info centers in the regions, **(e)** developing international cultural tourism routes, **(f)** diversification of tourism products, **(g)** promoting International Tourism Fairs and various events organized within the country, **(h)** encouraging various types of tourism, such as business, leisure, cultural, incentive, green, rural and ecotourism, and **(i)** human resources development on the basis of recently established Azerbaijan.

Within the Chairmanship of the Republic of Azerbaijan in the 5th Session of Islamic Conference of Tourism Ministers several events were held on the territory of the Republic: **(a)** role of tourism in the economies of OIC countries, **(b)** Forum of the Silk Road Tour Operators of Islamic Countries, and **(c)** training course in the field of tourism statistics of Islamic countries.

3.7 Tourism in Turkey

The Republic of Turkey is a *democratic secular constitutional republic*, mostly Muslim³⁸ with a very small Christian minority *which guarantees complete freedom of worship to non-Muslims*. Bridging the two continents, it is a gateway to East and West and centrally

³⁸ about 98% of the population.

located between Asia and Europe, with a land mass of 814,578 square kilometers (TURSAB 2004). Turkey is bordered by four seas: the Black Sea covers the north shores of the country, while the Marmara Sea is basically an inland sea situated in the northwest of the country connecting the Black and the Aegean Seas together and the Aegean Sea extends up to southwest connecting the Mediterranean Sea at south part of the country (Kaya, and Smardon, 2001).

A Brief Portrait of Turkey Tourism Industry. Turkey has an exceptional wealth of tourism assets (Alipour, 1996). The growth of tourism, as a new sector in the Turkish economy, coincides with the settlement of economic development plans introduced by government in the mid 1960s. It was soon realized that the tourism sector could be very effective for solving the foreign currency shortage within the economy, as well as support the increase of national income (Altaban 1998). Long a destination for scholars, adventurers, and the privileged few, Turkey is now encouraging visits from an expanding tourist market (Baki, 1990). It is become one of the largest and fastest growing sectors of Turkey. Turkey's newfound economic prosperity and cultural shift to the West has stimulated for many businesses to open in recent years, nightclubs in particular.

Attractions. Turkey has always been perceived as an exotic destination (Var, 2005). Its attractions include its historic cities— where traditional and contemporary and ancient and super modern go hand in hand, archeological treasures, picturesque towns, villages and rural settlements, miles of unspoiled beaches, and a sun-drenched climate. Istanbul, the city of beauty unmatched, proudly preserves the historical legacy of the three empires and cultural treasures of inestimable value. Turkey has a coastline including islands of 8333 kilometers.

Getting into and roaming around. Ataturk International Airport (AIA) is Turkish main international airport³⁹, linked to the capital via highway and an express rail link⁴⁰. Turkey

³⁹ situated in Istanbul, in the west of the city, about 24kilometers from the capital city, Istanbul.

has many others international airports in the city of Ankara, Sabiha, Izmir, Adana, Antalya, Bodrum, Dalaman, and Trabzon. Turkish Airlines, the main state airline provides an important network of internal flights from Istanbul, Ankara, Adana, Antalya, Dalaman, Izmir, and Trabzon to all of the major Turkish cities. Private airlines also operated within the country including Atlasjet, Corendon Airlines, Onur Air, Pegasus Airlines, and SunExpress. On the other hand water, train, and road journeys can be made to Istanbul via some of the major European cities. Antalya, Bandirma, Çeşme, Istanbul, Izmir, Marmaris, and Mersin are the main ports of Turkey. There are entry points by road from Bulgaria, Georgia, Greece, the Syrian Arab Republic, and Iran.

The traveler runs from one surprise to another in Turkey where traditional and modern go hand in hand (TURSAB, 2004). Tourists have many options to move around within the country by taking flights, train car/taxi buses, and cruisers to all most every destinations.

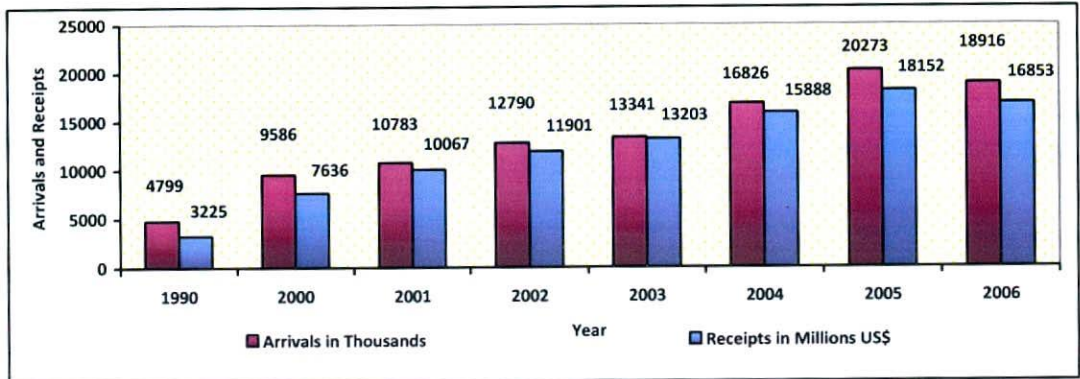
The accommodation industry of Turkey at present has made a considerable effort to develop its hotel facilities including a wide range of facilities from the top quality, super modern deluxe category hotels, holiday complexes, and boutique hotels to the affordable ones. There are numerous ski, winter resort, and spa hotels in various parts of the country (TURSAB, 2004).

International tourist arrivals and tourism receipts. Tourists are flocking to Turkey in increasing numbers. Turkish tourism has made a remarkable progress over the last two decades. Since mid 1980s both the number of foreign arrivals and the tourism receipts have grown at a remarkable rate, though fluctuating at times due to the clearly known external factors beyond the control of the sector. Over the last decade, the number of international tourist arrivals in Turkey increased from about 4,799 thousands in 1990 to 9,586 thousands in 2000, corresponding to an average annual growth rate of 9.97%. In

⁴⁰ the Express Rail Link is a standard gauge and electrified railway line in Turkey.

the same period international tourism receipts increased from US\$ 3,225 million to US\$ 7,636 million, equivalent to an average annual growth rate of 13.68%. [Table: 3.16]

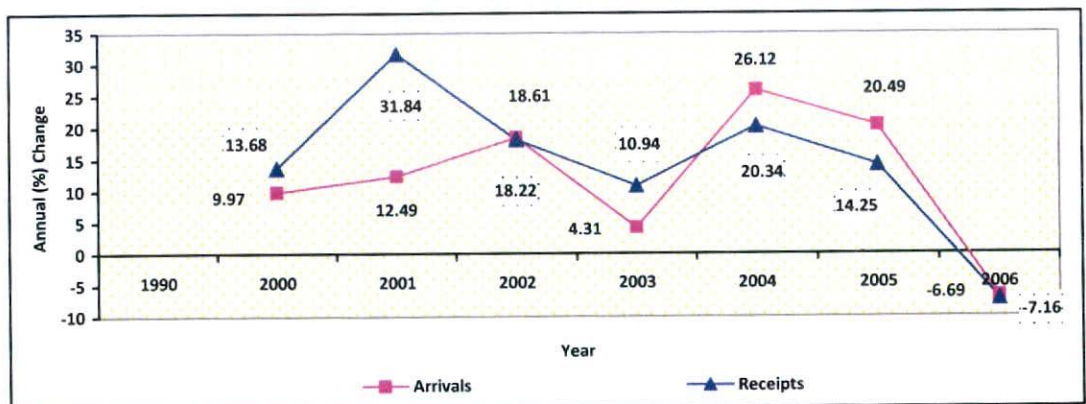
Figure 3.22: International Tourist Arrivals in Turkey during 1990 to 2006



Source: Table: 3.16 in the Annex.

The number of international tourist arrivals in Turkey in 2001 amounted to 10,783 thousands, corresponding to an increase by 12.49% in 2001 over the year 2000 and generated US\$ 10,067 million as international tourism receipts, corresponding to an increase by 31.84%. [Table: 3.16]

Figure 3.23: International Tourist Arrivals and Tourism Receipts in Turkey (Annual % Change) during 2000 to 2006



Source: Table: 3.16 in the Annex.

In 2002, the number of international tourist arrivals in the country, amounted to 12,790 thousands with a annual growth rate of 18.61% over the previous year and international tourism receipts in the same year amounted to US\$ 11,901 million, corresponding to an increase by 18.22% over the year 2001. [Table: 3.16]

In 2003, the number of international arrivals in the country increased by 4.31% to 13,341 thousands and international tourism receipts in the country amounted to US\$ 13,203 million, corresponding to an increase by 10.94% over 2002. [Table: 3.16]

The year 2004 the country reached 16,826 thousands arrivals, corresponding to an increase by 26.12% over the previous year and international tourism receipts amounted to US\$ 15,888 million in the same year, corresponding to an increase by 20.34% over 2003. [Table: 3.16]

The year 2005 was unquestionably better than ever in the industry. The number of international tourist arrivals in the country grew by 20.49% to 20,273 thousands and international tourism receipts amounted to US\$ 18,152 million in the same year, corresponding to an increase by 14.25% compared to the last year. [Table: 3.16]

The data available for 2006 show that the number of international tourist arrivals in Turkey decreased by 6.69% to 18,916 thousands. In contrast, Turkey reached US\$ 16,853 million in 2006 as international tourism receipts, corresponding to a decrease by 7.16% over the level of 2005. [Table: 3.16]

Human resource development and employment issues. As in many countries, small and medium-sized hotel enterprises (SMHEs) in Turkey play a great role in the economy, due to their significant share within the tourism industry in terms of number of enterprises, employment and investment (Avcikurt, 2003). However, the tourism industry has created job for the country people (Topal, 2002). About 5.5% of the total employment in

Turkey is in the tourism sector recorded in 2006 (TTIA, 2008). Over one million people are employed directly in this sector (Topal, 2002), with over three million indirect employments. The most significant characteristic of the tourism industry is its labor-intensive side and this enables developing countries like Turkey to *offer deploy opportunities for the young people who are keen to work in tourism institutions* (Albayrak and Caber, 2009). Meanwhile, it has been found that the limited practical training opportunities for higher education tourism students and reform in the Turkish tourism industry are required to address the difficulties of retaining qualified graduates within the sector (Okumas and Yagci, 2006).

In recent time, Turkey *Tourism Strategy- 2023* includes plans for improvements in tourism training and education with a vision to ensure personnel qualified at university degree level and specifically indentifies tourism management subject areas as required further development. However, the implication is that this will be full or part time training, aimed at people coming into the industry from school, rather than necessary offering more flexible training for those already in the industry (Guthrie, 2008).

Tourism policy. The Turkish government played a dominant role in the development of tourism by constantly interacting with political, social, and economic components of the polity (Göymen, 2000). The development of tourism in the country has been involved directly or indirectly in the government's policy and planning process with the major aim of identifying the variables that are at work within the tourism organizations and administrative system (Alipour, 1996). *Development of tourism has been allied with the general economic development of the country* under various government policies in five important time periods including: **(a)** strong nationalistic policy, 1924-1950, **(b)** protectionist liberalism, 1950-1960, **(c)** planned economy period, 1961-1980, **(d)** introduction to private entrepreneurship, 1980-1990, and **(e)** emphasis on private sector and liberal economic policy, 1990-present (Var, 2005).

The strong nationalistic policy emphasized infrastructure development that considered important steps in the development of Turkish tourism. In the period of protectionist liberalism, recognition of tourism as a sector was made and the Ministry of Tourism was created (in 1965). During this period construction of seaside houses and the entry of Hilton Hotel into Turkish tourism were made and the highway to some coastal areas were planned and completed as well as *emphasis was placed on airline and marine transportation, and communication.*

In the period of *introduction to private entrepreneurship, several important legislations were enacted for the creation of tremendous demand from domestic and foreign tourism investors* in coastal areas in particular: **(a)** Tourism Encouragement Law of 1982, **(b)** Environmental Protection Law 1983, and **(c)** National Parks Law 1983. During this period initiatives for private sectors were given containing **(a)** free land for 49-year lease, **(b)** credit up to 60% through Tourism Bank, **(c)** long term credit through Tourism Encouragement Fund with low interest rates, **(d)** setting up and operating casinos, **(e)** permission to serve alcoholic beverages, **(f)** special utility rates for hotels, and **(g)** employment of foreign nationalities in tourism sector. Finally, the emphasis on private sector and liberal economic policy period underlined the considerable interest in tourism (Var, 2005).

Turkey signed up to the General Agreement on Trade in Services (GATS) in 1999 and this has a number of implications for tourism including: **(a)** foreign personnel in hotels and restaurants may not exceed 10% of the local workforce, **(b)** foreign tour operators are not allowed to organize tours abroad, only to bring tourists in, **(c)** the only restriction to selling and marketing is the requirement for foreign suppliers to establish themselves in Turkey, and **(d)** foreigners can buy property in Turkey.

However, in recent time authority for tourism development is vested with the Ministry of Tourism and Culture— formed as a result of a merger between two previously

separate ministries in 2003. Many other organizations have also been worked in the development of Turkish tourism viz.: **(a)** TÜRSAB–Turkish Association of Travel Agencies, **(b)** TYD– The Turkish Tourism Investors’ Association, **(c)** TÜROB– Touristic Hotels and Investors Association, **(d)** TUROFED– Turkish Hotels Federation⁴¹, **(e)** TUREB– The Tourist Guides’ Association, and **(f)** BSEC– The Black Sea Economic Cooperation organization⁴². BSEC aims for comprehensive multilateral cooperation in a broad array of fields including tourism.

Tourism Vision of *Turkey 2010* was launched in 2004 with the objectives of **(a)** giving the priority for sustainable tourism, **(b)** ensuring the preservation of cultural heritage, **(c)** recognizing the value of Turkey’s core product of sun, sea, and sand tourism, **(d)** emphasizing diversification of product including sports (golf, horse riding, skiing, etc.) and health spas, **(e)** expanding tourism development from the current focal areas (particularly coastal areas) to inland, **(f)** focusing on quality rather than quantity, and **(g)** emphasizing on environmental sustainability. During this mission Turkish tourism has been explored in many exciting areas of tourism development by focusing health tourism, conference tourism (Cappadoccia Region), cultural tourism (Diyarbakır, Batman, Gaziantep, Adıyaman, Şanlıurfa, and Mardin) and mix of tourism products including golf, culture, and beach (Black Sea and East Anatolia). Specifically, Tourism Vision 2010 addresses the *integration of local communities* into tourism planning and development (TTF, 2005).

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As an EU candidate country, which has started accession negotiations with the EU, Turkey has started a project to harmonize its tourism legislation with the EU. Turkey’s Tourism Investors’ Association is undertaking a project to harmonize Turkey’s tourism legislation with the EU legislation, for reorganization of the whole regulatory framework for the tourism sector is mandatory under EU accession (TTF, 2005).

⁴¹ an alliance of 10 regional and hotel associations.

⁴² BSEC is a regional economic body based in Istanbul with eleven participating states: Albania, Armenia, Azerbaijan, Bulgaria, Georgia, Greece, Moldova, Romania, Russia, Turkey, and Ukraine.



In the meantime, Turkish tourism has been exercised more improvement in the area of supplying drinking water, quality of bathing water, and waste water treatment services in tourist areas, developing official Turkish websites available in English, developing associations with municipalities, and applying environmental regulations as same standards as in any other EU country.

Recently, the government has been approved the Tourism Strategy of Turkey 2023 and Activity Plan for Tourism Strategy of Turkey 2007-2013 with the objectives of improving the tourism sector on national and regional basis and guiding the tourism and travel industry at production management phases that aims at providing extension to management, implementation of strategic planning efforts, and boosting the *cooperation between public and private sectors* of tourism (MCT Ankara, 2007).

Turkey's tourism promotional budget in 2007 was more than \$100 million and the country is being advertised on billboards, buses, taxis, and in TV commercials all around the world (Emirgil, 2008). World Wide Fund (WWF)-Mediterranean and WWF-Turkey are also working to promote for the responsible tourism in the country.

It is now commonly accepted that Turkey has one of the most progressing tourism industries in the world. Turkey has been successful in *providing incentives to native and foreign investors* for further tourism development (Uysal, 2005).

3.8 Tourism in Northern Cyprus

Northern Cyprus officially called the TRNC– Turkish Republic of Northern Cyprus (Diez, 2002), is a typical small island state as an independent democratic and secular republic lies in the clear blue waters of Mediterranean Sea, located in the north of Cyprus with a

total landmass of 3,355 square kilometers and over 250,000 inhabitants⁴³. The majority of population is Muslim⁴⁴ and Christianity is also widespread in the country. Northern Cyprus provides a most hospitable welcome with its friendly people.

A Brief Portrait of Northern Cyprus Tourism Industry. In the economy of Northern Cyprus, services represent a significant proportion primarily the public sector, trade, construction, tourism, and education. Tourism having a good tourism infrastructure with sufficient, quality lodging, and other facilities continues to be a basic priority sector and one of the main factors of economic development of Northern Cyprus.

There are several tour agencies providing holidays to Northern Cyprus. Many offer travel tours to various holiday destinations. The country is also proving to be a popular destination for overseas retirement, with substantial growth of the private holiday home developments due to the easing of travel arrangements between Northern and Southern Cyprus, the relatively low cost of living and the splendid climate. Since gambling is permitted, the Northern Cyprus also serves as an important holiday destination for *tourists coming from Turkey, where casinos are banned*. Tourism as an industry is producing the lifeblood of the economy and foreign exchange.

The Northern Cyprus tourism industry has been sensitive to the political instability on the island, which has arisen from the political problems between the Turkish and Greek Cypriots (Altinay et.al, 2002). Tourism in the Turkish zone is hampered by legitimacy problems. Since the Northern Cyprus is not recognized as an independent and sovereign state by any other nation except Turkey, it does not have official offices to represent a country's commercial interests in other countries where visitors or tourism agencies can easily promote tourism and arrange travel.

⁴³ according to the final results of the Census of Population and Housing Unit, which was held on 30 April 2006, the de-facto population of Turkish Republic of Northern Cyprus is 265,100.

⁴⁴ religious festivals are often celebrated in the tradition of the Islam faith.

Attractions. Northern Cyprus is a paradise island of incomparable natural beauty, full of unique historical treasures, blessed with seemingly endless sunshine, and enjoys one of the healthiest climates in the world.

The coastline of Northern Cyprus offers some of the finest and safest bathing opportunities along with snorkeling, sailing, and skiing in the Mediterranean. The country is also renowned for its wild flowers, which carpet the island in spring⁴⁵ and scent of orange, lemon, and grapefruit blossom fills the air.

The long sandy beaches in Northern Cyprus are one of the best attractions of the island, offers many facilities like Yachting/boat tours, water sports, scuba diving, dolphin sailing, paragliding, and others.

However, the country offers various services to four main tourism market segments: **(a)** education, **(b)** gambling, **(c)** adult entertainment, and **(d)** sun-sea and sand (Cansel and Ekiz, 2007). Tourists also visit Northern Cyprus for attending to conferences, adventure tourism, religion, and sports tourism purposes.

Getting into and roaming around. The Turkish Republic of Northern Cyprus can be reached by air. Flights are available to Northern Cyprus via Turkey. Cyprus Turkish Airlines (CTA) with other three public and private Turkish airlines provides connections from international airports. Northern Cyprus has direct air links only with Turkey, where all planes must first touchdown. Northern Cyprus has two international airports. The large of the two is Ercan Airport near Nicosia and the other is Gecitkale near Famagusta. Flights arrive at Ercan airport from which most hotels have transport services.

Most of the hotels in Northern Cyprus are run by Turkish Cypriot families and offering home comforts with their quality accommodations from luxurious to budget. All hotels

⁴⁵ there are more than 38 species of orchids alone.

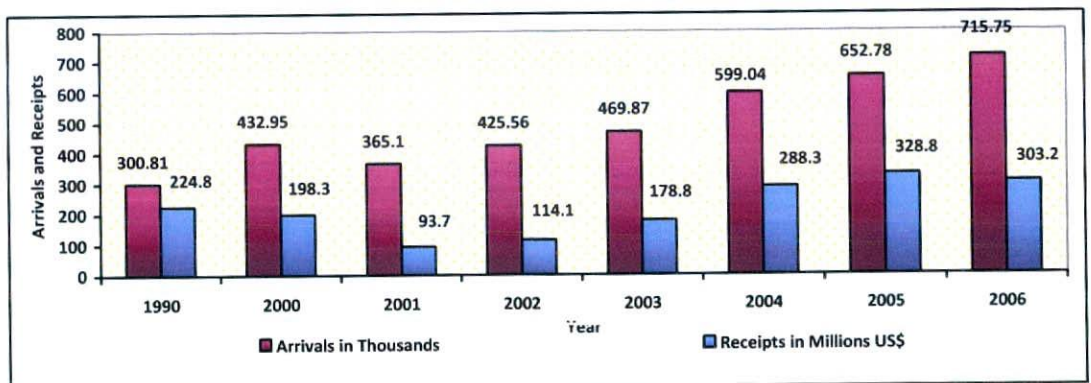
are known by their hospitality, quality, and friendly service. There is a wide range of accommodation offered in the country ranging from 5 star Hotels, Hotel-Bungalows, Hotel-Apartments, camping and Self Catering Apartments, and Villas to small family-run bed and breakfast establishment.

One of the best attractions of Northern Cyprus is traditional Turkish Cypriot Cuisine. There are countless quality restaurant, bar, and cafes those offering for taste of all palates.

There are frequent bus services between the major towns during the day. Car hire in Northern Cyprus is one of the great needs to explore the beauty of the island.

International tourist arrivals and tourism receipts. Over the last decade, the number of international tourist arrivals in Northern Cyprus increased from about 300.81 thousands in 1990 to 432.95 thousands in 2000, corresponding to an average annual growth rate of 4.39%. In the same period net tourism revenue decreased from US\$ 224.8 million to US\$ 198.3 million, equivalent to an average annual declined rate of -1.18%. [Table: 3.17]

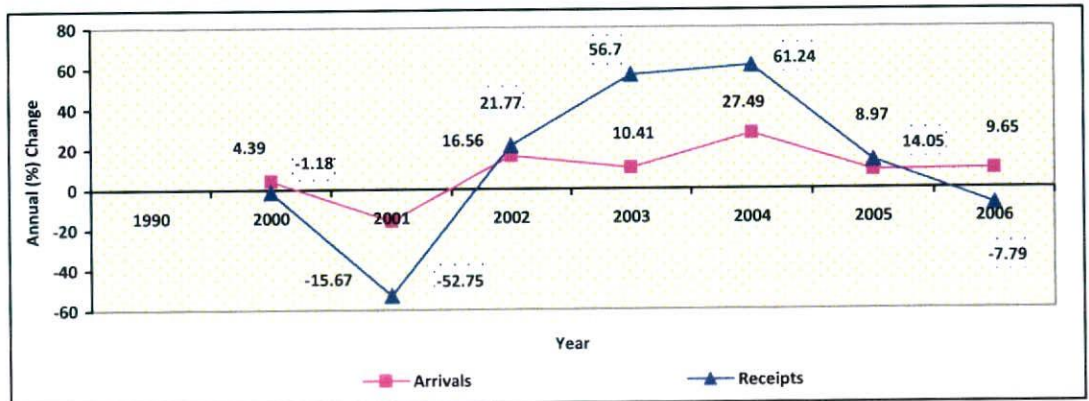
Figure 3.24: International Tourist Arrivals in Northern Cyprus during 1990 to 2006



Source: Table 3.17 in the Annex.

The number of international tourist arrivals in Northern Cyprus in 2001 amounted to 365.10 thousands, corresponding to a decrease by 15.67% in 2001 over the year 2000 and generated US\$ 93.7 million as net tourism revenue, corresponding to a decrease by 52.75%. [Table: 3.17]

Figure 3.25: International Tourist Arrivals and Tourism Receipts in Northern Cyprus (Annual % Change) during 2000 to 2006



Source: Table: 3.17 in the Annex.

In 2002, the number of international tourist arrivals in the country, amounted to 425.56 thousands with a annual growth rate of 16.56% over the previous year and net tourism revenue in the same year amounted to US\$ 114.1 million, corresponding to an increase by 21.77% over the year 2001. [Table: 3.17]

In 2003, the number of international arrivals in the country increased by 10.41% to 469.87 thousands and net tourism revenue in the country amounted to US\$ 178.8 million, corresponding to an increase by 56.70% over 2002. [Table: 3.17]

The year 2004 the country reached 599.04 thousands arrivals, corresponding to an increase by 27.49% over the previous year and net tourism revenue amounted to US\$ 288.3 million in the same year, corresponding to an increase by 61.24% over 2003. [Table: 3.17]

In 2005, the number of international tourist arrivals in the country grew by 8.97% to 652.78 thousands and net tourism revenue amounted to US\$ 328.8 million in the same year, corresponding to an increase by 14.05% compared to the last year. [Table: 3.17]

The year 2006 was unquestionably better than ever in the industry. The data available for 2006 show that the number of international tourist arrivals in Northern Cyprus increased by 9.65% to 715.75 thousands. In contrast, Northern Cyprus reached US\$ 302.2 million in 2006 as net tourism revenue, corresponding to a decrease by 7.79% over the level of 2005. [Table: 3.17]

Human resource development and employment issues. In Northern Cyprus the tourism industry plays a key role in the economy for both revenue and employment. The tourism and rentals sectors have been identified as principle drivers for the improvement of Northern Cyprus economic growth, which today employs approximately 11.4% of the islands workforce. In 2005, the tourism industry contributed US\$ 145.6 million (3.3%) to the GDP of Northern Cyprus and created 8.004 jobs (Bavik, 2008). *Major universities are offering graduation, post graduation and some diploma and certificate courses to create skill forces for the industry.*

Tourism policy. Improving *tourism industry was at the agenda of the economic targets* that have been set by “Five Year Development Plans” (FYDP) in Northern Cyprus since 1978 (Katircioglu et.al, 2007). Turkish Cypriots started to live on the North, created their own regulations and lives after 1974. The First Transition Program was prepared in 1977 to achieve economic development and arrive at economic targets. Since the First Transition Program in 1977, Northern Cyprus has experienced 3 Five Year Development Plans to reach economic targets: **(a)** First Five Year Development Plan (FFYDP) Period: 1978–1982, **(b)** Second Five Year Development Plan (SFYDP) Period: 1988–1992, and **(c)** Third Five Year Development Plan (TFYDP) Period: 1993–1997.

In the FFYDP period, the *policies for improving capacity have taken place* for determining marketing targets. Among the other important targets regarding tourism development in this plan are: **(a)** attracting more tourists from abroad, **(b)** prolonging average stay periods in tourist foundations, **(c)** preventing seasonal fluctuations in tourism sector, **(d)** increasing tourism revenues, **(e)** improving internal tourism, **(f)** adopting mass tourism, **(g)** implementing effective marketing and recognition activities, **(h)** arranging education programs on tourism, and **(i)** increasing bed capacity (SPO, 1978).

SFYDP was a period where the emphasis was given to the growth rates of fixed capital investments and to increase the number of establishments in the tourism industry. The first attempt to *increase service quality in tourism industry* has taken place in the SFYDP period. Among the other targets are: **(a)** establishing a strong cooperation between domestic tourism foundations and foreign travel agencies and improving tourism incentives, **(b)** increasing the number of tourists from the third countries, **(c)** speeding up recognition activities and setting up competitive prices in tourism industries, **(d)** starting flights to Europe to achieve direct flights both to European and Middle East countries and starting ferry boat travels to Turkey and other neighbor countries, and **(e)** increasing service quality in tourism industry (SPO, 1988).

The legislative framework for tourism policy in the Northern Cyprus is provided by the Tourism Incentive Law (1987) during this period (Sadler, 2004). This *essentially focuses on investment and encouragement of tourism through the provision of a number of incentives*: **(a)** import duty exemptions for investment goods concerning a project, **(b)** government contribution to charter risk, **(c)** contribution to the brochure and advertisement expenditure, **(d)** exemption from income tax for a period of ten years in the case of investment in the tourist accommodation units, and/or operating charter flight, **(e)** annual interest and principal installments of foreign loans enjoy a transfer guarantee, **(f)** a deduction of 20% of annual foreign exchange gross earnings from taxable income for hotels and travel agencies, **(g)** repatriation of profit without any

restriction and limitation, **(h)** free transfer of proceeds in the case of the liquidation on an investment, **(i)** employment of foreign qualified personnel who are not available locally, **(j)** transfer of net income earned by foreign personnel is free, **(k)** exemption from construction license fee, and **(l)** travel and advertisement expenses for promotion and marketing are deducted from taxable profit (MEF, 1994).

The most important target of the TFYDP period for tourism was to protect the nature, history, culture, and environment of Northern Cyprus. The serious attempts on *"Tourism Master Plan"* and other important legal arrangements for tourism industry have taken place in this period. Among the other targets, which gave importance to product variety are: **(a)** extending tourism seasons and increasing the number of night stays, **(b)** preparing education programs on tourism development targets, **(c)** improving the relations with international tourism foundations, **(d)** encouraging cooperation between public and private sectors on marketing tourism services, and **(e)** opening tourism offices in tourist sending countries and having cooperation (SPO, 1993).

During this period numerous policies have taken through the 1997 *economic development plan to accelerate the tourism growth*. These are mainly due: **(a)** to develop physical plans and a tourism master plan, **(b)** to protect historical and natural environment and protect against environmental pollution by the provision of legally protected areas and national parks and to establish statutory agencies. these areas are to be away from tourism development, **(c)** to establish an integrated tourism and environmental policy which has legal powers of enforcement, **(d)** to expand the length of tourist season, support winter tourism, and increase the length of stay and spend of tourists, **(e)** to improve tourism facilities and encourage health, golf, village, sailing, third age, youth cultural, and conference tourism, **(f)** to further encourage the privatization of industries, **(g)** to encourage liaison between government employees and tourism industries professionals, **(h)** to improve quality by the introduction of standards for travel agencies and accommodation units, **(i)** to introduce environmental studies into

the educational curriculum so as to improve environmental and tourism awareness, **(j)** to continue negotiations for direct flights into the Northern Cyprus from origin countries, **(k)** to increase marketing overseas for tourism and improve the image of the Northern Cyprus, **(l)** to participate in international fairs, conferences, and festivals and to research the possibility of the Northern Cyprus hosting such activities, **(m)** to improve the competitive advantage of tourism over regional competitors, and **(n)** to recognize the importance of tourism and to cooperate with local administration, tourism industries, investors and the general public in order to coordinate development (DPO, 1996).

In parallel with the program of economic development accepted by Government of Northern Cyprus, the tourist sector has been designated as the most important sector of development of economy and the *government has decided in every possible way to help and give all necessary privileges and encouragements to potential investors* in tourist sector. The Government clearly requires more involvement with relevant stakeholders when considering the location, type, and size of tourism development, as well as a clearer understanding of whom and what their market is.

Meanwhile the Government of Northern Cyprus has *developed tourism plan*. The purpose of this plan is to apply the tourism plans as a government policy by taking into consideration the regional differences and specialties of Northern Cyprus by protecting the natural environment, historical heritage, and culture and by contributing to national economy of the country and by considering total quality idea in the tourism sector. The main targets of the tourism development plan are: **(a)** to develop a tourism product while considering regional differences, **(b)** to form a sustainable tourism model, **(c)** to spread tourism activities through the whole country and keep tourism sector alive for 12 months, and **(d)** to consider quality as a lifestyle for tourism. In contrast, the main politics in Northern Cyprus tourism planning are: **(a)** to create different tourism products against its competitors by considering comparative superiorities, **(b)** to consider a

tourism development which is depending on regional differences, **(c)** to develop mass tourism prudently and consider special interest tourism as well, **(d)** to develop tourism in a way to benefit from natural and man-made environment for a long time, **(e)** to create a tourism development model which depends on small and middle scale managements, **(f)** to create a tourism formation which go together with special enterprise, national government organizations, local governments, and universities, **(g)** to consider a tourism development model which will complement with other sectors in the economy, **(h)** to consider a model which will suit to the social and economic conditions of the country and physical carrying capacities of the country, and **(i)** to develop local tourism as well as external tourism. In order to achieve a planning development in the tourism sector to meet increasing demand in tourism investments and also to spread the economic developments all across the country, tourism investment zones have been planned. Bafra region has been determined as a 'tourism investment zone' in 2003. Bafra Tourism Investment Zone is divided into 13 investment areas.

However, the political isolation made everything worse in Northern Cyprus. The tourism industry has not been able to maximize its potential, owing to the lack of direct flights from other countries, and delays in the formulation and implementation of the Tourism Master Plan, which was initiated in 1994 and finalized in 1999 (Oktay, 2007).

3.9 Tourism in Niger

The Niger is a landlocked country located between Algeria and Libya to the North, Mali and Burkina Faso to the West, Benin and Nigeria to the South and Chad to the East with an area of 1,267,000 square kilometers. It is the broader West Africa countries. Niger has 14.2 million inhabitants with a dozen of ethnic⁴⁶ of which 99% Muslim (Karidio, 2009). The geographical position of the country made a Grand Junction exchanges

⁴⁶ Hausa, Djerma Songhai, Peulh, Touareg, beriberi, Arabic, Toubou, Gurma, etc.

between sub-Saharan Africa and the Maghreb Arabic. Niger works tirelessly for take-off and its economic development and integration of its economy in the world through mining, agriculture, livestock, and other activities like tourism.

A Brief Portrait of Niger Tourism Industry. Niger is a peaceful state reputable for its hospitality and good neighborliness. The country is blessed with abundant tourism potentials which have suffered significantly due to low patronage and insufficient facilities. The country aims at reversing this trend by encouraging and supporting private sector participation, with a view to making the state one of the leading tourist centers in the region (Akpobasah et.al, 2004).

Travel retails play an important role in the development of travel and tourism in Niger as the country is not a mass tourist destination. Despite numerous assets, Niger suffers from a lack of tourism investment, which would attract a larger number of international visitors. The country is unevenly developed, with the north's facilities outweighing the south's infrastructure. This is mainly due to the fact that most tourists are attracted by the desert, which is largely located in the north. As a result, the government is working towards developing the south of the country. However, Niger tourism has developed a great deal in the current years.

Attractions. Niger has many resources that can enable the development of several forms of tourism. The country is encompassed by cultural, wildlife, historical, archaeological riches, and other magnificent attractions which include: **(a)** rich and varied country culture, **(b)** tall rock paintings and etchings, and **(c)** rich heritage of the valley of the River Niger.

There are rivers, valleys, mountains, plateaus, and many places of tourist attraction in the country, which have allured tourists from a long time. Natural sights in the country are enough to captivate and mesmerize any nature lover.

The Sahara Desert is the primary attraction in the country. There are ample facilities of camel-trekking on the grand desert. The desert provides a vivid picture of Bedouin and caravan culture. There are many tribes and clans, who inhabit the desert and have a distinct culture and custom of their own.

River Niger is another major factor that has enhanced tourism in Niger. There are many national parks and wildlife reserves that are based in close vicinity of the river. There are also waterfalls of Timia, which are extremely attractive. The "W" National Park along the Niger River offers views of a variety of fauna, including lions and elephants.

The cities of Niger, namely Zinder, Niamey, and Agadez are also storehouses of entertainment and information. There are various architectural and historical monuments in these cities, which enhance the glory of the cities. There is also a museum and an art academy in Niamey along with a commercial and financial center. *Though the country is not highly developed, but it is a place worth-visiting in the African continent.*

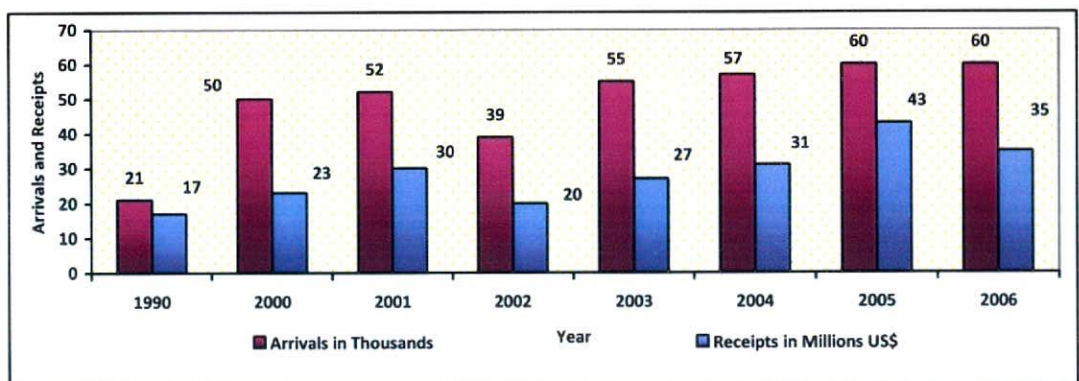
Other tourist attractions include Agadez's 16th century mosque, one of the oldest in West Africa, villages built on piles in Lake Chad, the annual six-week gathering of nomads near Ingal, the Great Market, and Great Mosque in Niamey.

Getting into and roaming around. Niger is accessible by road, air, rail, and water transportation. The tourism industry in Niger is serviced by both local and international operators. The capital city is served by international airlines. Some airports also provide charter services allowing visitors to access remote parts of the country not serviced by scheduled airlines. While the cost of getting to Niger from Europe, Asia, or America is relatively high, local travel costs range from very cheap to deluxe on international scales.

Some of the large American and European hotel chains have a foothold in Niger. Standards of establishments and service range from international six star ratings to, quite simply, primitive. However, new tourism and leisure facilities are being developed to achieve the target.

International tourist arrivals and tourism receipts. In some parts of the world, there exist some physical features which beat the imagination of man and attract tourists in large numbers (Janzaki, 2007). However, over the last decade, the number of international tourist arrivals in Niger increased from about 21 thousands in 1990 to 50 thousands in 2000, corresponding to an average annual growth rate of 13.81%. In the same period international tourism receipts increased from US\$ 17 million to US\$ 23 million, equivalent to an average annual growth rate of 3.53%. [Table: 3.18]

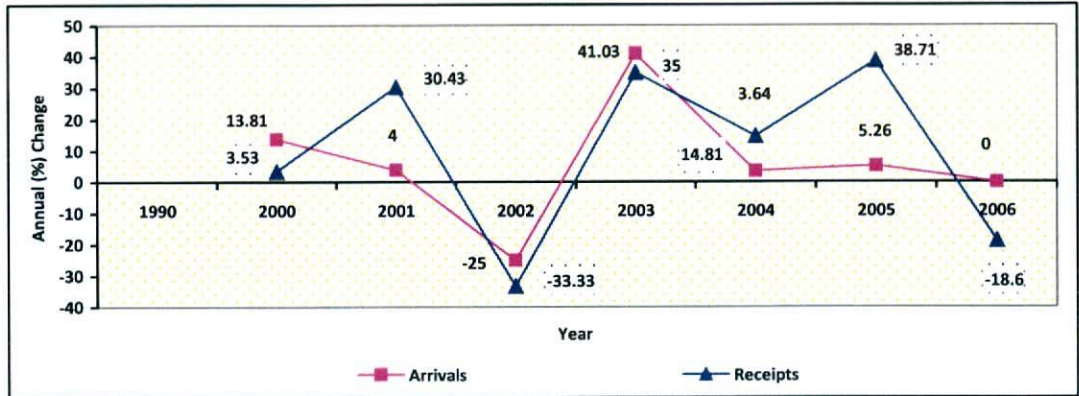
Figure 3.26: International Tourist Arrivals in Niger during 1990 to 2006



Source: Table: 3.18 in the Annex.

The number of international tourist arrivals in Niger in 2001 amounted to 52 thousands, corresponding to an increase by 4% in 2001 over the year 2000 and generated US\$ 30 million as international tourism receipts, corresponding to an increase by 30.43%. [Table: 3.18]

Figure 3.27: International Tourist Arrivals and Tourism Receipts in Niger (Annual % Change) during 2000 to 2006



Source: Table: 3.18 in the Annex.

In 2002, the number of international tourist arrivals in the country, amounted to 39 thousands with a annual growth rate of -25% over the previous year and international tourism receipts in the same year amounted to US\$ 20 million, corresponding to a decrease by 33.33% over the year 2001. [Table: 3.18]

In 2003, the number of international arrivals in the country increased by 41.03% to 55 thousands and international tourism receipts in the country amounted to US\$ 27 million, corresponding to an increase by 35% over 2002. [Table: 3.18]

In the year 2004, the country reached 57 thousands arrivals, corresponding to an increase by 3.64% over the previous year and international tourism receipts amounted to US\$ 31 million in the same year, corresponding to an increase by 14.81% over 2003. [Table: 3.18]

In 2005, the number of international tourist arrivals in the country grew by 5.26% to 60 thousands and international tourism receipts amounted to US\$ 43 million in the same year, corresponding to an increase by 38.71% compared to the last year. [Table: 3.18]

The data available for 2006 show that the number of international tourist arrivals in Niger as same as 2005 i.e. 60 thousands. In contrast, Niger reached US\$ 43 million in 2006 as international tourism receipts, corresponding to a decrease by 18.60% compared to the last year. [Table: 3.18]

Human resource development and employment issues. Niger Jobs are not that enormous in number as the industrial sector of the Niger is not that well developed. Tourism and Hospitality industry is slowly developing, giving opportunities to various hotel management and tourism degree or diploma holders. Niger jobs are also limited in the urban sectors. Niger's 12,000 travels and tourism direct industry jobs account for 1.1% of total employment in 2009. The contribution of the travel and tourism economy to employment is 38,000 jobs in 2009, 3.4% of total employment or 1 in every 29.4 jobs (Baumgarten, 2009).

Tourism policy. The government of Niger *has promoted both domestic and international tourism* since 1984. The government is *giving priority to the development of the local tourism industry* so that the country can win its fair share of the millions of visitors each year from around the world who want to experience firsthand some of the very special places that abound on the African continent (MBendi, 2009).

Various programs have been taken for the development of tourism in the country viz. **(a)** new facilities is provided and existing one is renovated, **(b)** supportive environment policy is put in place to attract the private sector to contribute at least 60% to the development of the industry, **(c)** security system is improved to make the environment tourism friendly, and **(d)** computerization of tourism facilities is embarked upon and information about the huge potentials of tourism in the state is disseminated locally and internationally via the internet (Akpobasah et.al, 2004). The Department of Tourism and Crafts was created in August 1996 and rehabilitated in December 2004 with the responsibility of developing and implementing the national policy on tourism and crafts.

The tourism development program leads the Department of Tourism and Crafts to *collaborate with different ministerial departments*: **(a)** Ministry of Culture, Arts, and Artistic Entrepreneurship, **(b)** Department Responsible for the Environment, **(c)** Ministry of Economy and Finance including the National Institute of Statistics (INS) and the Office for Development, **(d)** Ministry of the Interior, Public Security, and Decentralization, and **(e)** Department of Lessons which is the Institute of Research in Humanities.

Tourism was considered growth pool in 2007 with its inclusion in the accelerated development and poverty reduction strategy paper⁴⁷. The pool of tourism which should grow by 6.8% annually between 2008 and 2012, several strategic axes have been taken into action to make this program successful such as: **(a)** identification and the development of new tourist sites, **(b)** training and improving the quality of services, **(c)** sanitation, **(d)** institutional support for the promotion and marketing, **(e)** development of local activities, and **(f)** hotel and tourist infrastructure rehabilitation.

Implementation of this policy and the will of the government are however seriously hampered by the armed conflict in the North of the country. The Government is now trying to diversify tourism products and add value to the South and Center East of the country. The authorities in charge of tourism launched in the definition of a national strategy for sustainable development of tourism in Niger. However, tourism had suffered a steady decline throughout the early 1990s but has rebounded somewhat in recent years. In spite of these constraints, important actions were carried out in favor of the sector: **(a)** the decentralization of services, **(b)** improvement of the institutional, legislative, and regulatory framework, **(c)** the communities involved in the development of both sectors private and public, **(d)** the establishment of an incentive for investment scheme, and **(e)** increasing infrastructure at home.

⁴⁷ document frame of reference of the Government: axis 1– strong growth, diverse creative jobs and sustainable.

3.10 Declaration of the Seminar on Development of Tourism in the Muslim World

In fulfillment with the relevant resolutions of the 35th session of the Council of Foreign Ministers of the OIC⁴⁸, the Deputy Prime Ministry and Ministry of Foreign Affairs of the Turkish Republic of Northern Cyprus under sponsorships of the OIC and in collaboration with the Islamic Center for Development of Trade, the Islamic Development Bank Group, and the other OIC institutions, organized a Seminar on *Development of Tourism in the Muslim World* from 15th to 17th April 2009 in Girne, Turkish Republic of Northern Cyprus with the objectives of: **(a)** to gather experts from member states and the OIC institutions as well as from international and regional organizations in order to make an appraisal of the tourism sector in the OIC member states, **(b)** to examine the ways and means likely to promote the best practices in this field and give impetus and facilitate intra-OIC tourist flows, **(c)** to formulate a set of concrete recommendations aimed at helping decision-makers to provide for the required intra-OIC tourism facilitation measures, and **(d)** to identify the most promising cooperation fields and market openings in this sector that can contribute to the growth of intra-OIC tourist flows and to the development of intra-OIC partnership and investment (Girne Summit 2009).

The authority approved with satisfaction the impact of this seminar which eventually showed the potential of tourism in the Muslim World. However, the following recommendations was agreed upon after the examination of all information and proposals presented to the seminar: **(a)** to give special attention to the joint ventures initiated by the OIC member states in the tourist sector, **(b)** to initiate an awareness program of the importance of cultural tourism and to improve the image of Islam in the world with the help of the Islamic Educational, Scientific, and Cultural Organization (ISESCO), Research Center for Islamic History, Art, and Culture (IRCICA), private sectors, international organizations, and concerned donor institutions, **(c)** to invite Universities within OIC member states to organize executive training sessions in the field of tourism

⁴⁸ held in Kampala, Republic of Uganda in June 2008.

in collaboration with the relevant OIC institutions, **(d)** to coordinate negotiating positions during the current WTO Trade negotiations by the OIC member states, **(e)** to develop joint regional projects⁴⁹ in tourism, **(f)** to encourage the establishment of alliances between tourism operators in the OIC Countries with a view to strengthening joint tourism marketing and promoting cooperation efforts at the subregions level as well as at the level of the OIC regions as a whole, **(g)** to diversify tourism products by the inclusion of sociocultural programs and traditional activities involving local communities along with ecotourism, **(h)** to participate actively and massively in the Fair of Islamic Countries, **(i)** to establish and facilitate linkages in air, land/rail, sea, and multimodal transportation with a view to facilitating access from one destination to another within the OIC region and from the rest of the World, **(j)** to take necessary measures to facilitate the entry and movement of tourists among the OIC member states and enhance intra-OIC tourism through, inter alia, simplifying administrative, and legal travel procedures, **(k)** to recognize and highlight the important role of the private sector in the promotion of tourism, **(l)** to actively participate (private sector of member states) in the International Tourism Promotion Company established by the Islamic Chamber of Commerce and Industry– ICCL, **(m)** to focus on the development of niche tourism in OIC member states, **(n)** to stress the importance of exchange of experiences and expertise among OIC countries in the fields of restoration and preservation of Islamic cultural heritage as well as in training of professional personnel for the tourism industry, and **(o)** to exchange business delegations with the Turkish Cypriot side with a view to exploring the opportunities of economic cooperation considering investment, cultural relations, sports, and university education (Girne Summit 2009).

The implementation these recommendations adopted by this seminar required a need to create synergies with the national tourism program of each of the OIC member states.

⁴⁹ like the project on the Silk Road and the regional project of trans-border protected parks and areas in West Africa.

Chapter Four

Tourism in Bangladesh

4.1 A Brief Portrait of Bangladesh Tourism Industry

Bangladesh has developed rapidly in recent years in different business sectors. It is a country with rich cultural history and good tourism destination. Bangladesh as a tourism destination has many facets. Country's tourist attractions include archaeological sites, historic mosques and monuments, resorts, beaches, picnic spots, forest and wildlife. The country offers opportunities for angling, water-skiing, river cruising, hiking, rowing, surfing, yachting and sea bathing as well as bringing one in close touch with mother nature. The country is also rich in wildlife and game birds. Bangladesh is a land of magnificent beauty, the heritage of a natural splendor and a historical legacy that dates back to the 7th century (A.D.). Unspoiled and often unexplored, the country offers the most exciting experiences to visitors, ranging from closeness with nature at its pristine best to a culture trip into civilizations— old and new. Its lavish natural beauty and green opulence is its one of the major prides. Moreover, the uniqueness of Bangladesh with its friendly hospitable people, its tantalizing cuisine, its quaint local customs, its wide array of delicately hand-crafted ware, its artistic and cultural events are an added bonus. The most note-worthy feature that underpins this extensive range of alluring attractions here is the incredibly low cost of living expenses for being a tourist.

History. The story of Bangladesh is very interesting, with the partition of India in 1947 the Bengal province got divided into two parts. The West Bengal was joined to India whereas the Eastern part by the name of East Bengal went with Pakistan. East Bengal later renamed East Pakistan got independence from Pakistan after a difficult war on March 26 1971 and Bangladesh was born.

The history of Bangladesh has been one of extremes, of turmoil and peace, prosperity and destitution. It has thrived under the glow of cultural splendor and suffered under the ravages of war. The earliest mention of Bangladesh is found in the Hindu epic, the Mahabharata (the story of Great Battle-9th century B.C). Evidence also suggests that

there was a strong Mongoloid presence as well. Soon after, in the 5th and 6th centuries B.C. came the Aryans from Central Asia and the Dravidians from Western India. Then came the Guptas, Palas, Senas, who were Buddhist and Hindus. From the 13th century (A.D.) the flood of Muslim invaders and the tide of Islam swamped the Buddhist and Hindus unto 8th century. Sometimes there were independent rulers like the Hussain Shahi and Ilyas Shahi dynasties while at other times they ruled on behalf of the imperial seat of Delhi. From 15th century the Europeans, namely; Portuguese, Dutch, French and British traders exerted an economic influence over the region. British political rule over the region began in 1757 (A.D.), when the last Muslim ruler of Bengal was defeated at Palassey. In 1947 the country was partitioned into India and Pakistan. Present Bangladesh becomes the Eastern Wing of the then Pakistan. But the movement for autonomy for East Pakistan started within a couple of years because of language and cultural difference and economic disparity between the two wings. The seeds of independence were sown through the Language Movement of 1952 to recognize Bangla as a state language. Ultimately the then East Pakistan emerged as a sovereign and independent state named Bangladesh in 1971 after nine month- long war of Liberation (starting on 26 March 1971) in which 3 million people courted martyrdom.

Economy. According to the IMF gradation, Bangladesh ranked as the 48th largest economy in the world in 2007. The economy has grown at the rate of 6-7% p.a. over the past few years despite inefficient state-owned enterprises, delays in exploiting natural gas resources, insufficient power supplies, and slow implementation of economic reforms (Chelsea, 2008). While more than half of the GDP belongs to the *service sector*, nearly two-thirds of Bangladeshis are employed in the agriculture sector, with rice as the single-most-important produce. Remittances from Bangladeshis working overseas, mainly in the Middle East and East Asia, as well as exports of garments are the main source of foreign exchange earnings. Economic growth is rather endogenous with slow growth in foreign direct investment. Although one of the world's poorest and most densely populated countries, Bangladesh has made major strides to meet the food

needs of its growing population. The land is devoted mainly to rice and jute cultivation, although wheat production has increased in recent years; the country is largely self-sufficient in rice production. Nonetheless, an estimated 10% to 15% of the population faces serious nutritional risk, and that food security is at risk for 45% of the population. Bangladesh's predominantly agricultural economy depends heavily on an erratic monsoonal cycle, with periodic flooding and drought. Although improving at a very fast rate, infrastructure to support transportation, communications, power-supply and water distribution is poorly developed. Bangladesh is limited in its reserves of oil, but recently there was huge development in coal mining. While the service sector has expanded rapidly during last two decades, country's industrial base remains narrow. The country's main endowments include its vast human resource base, rich agricultural land, relatively abundant water, and substantial reserves of natural gas that are depleting quickly and may disappear in the next 7-8 years (BSCAA 2009).

Historically Bangladesh is trade deficit country, financed largely through aid receipts and remittances from workers overseas. Foreign reserves dropped markedly in 2001 but stabilized in the US\$ 3 to US\$ 4 billion ranges (or about 3 months' import cover). In January 2007, reserves stood at US\$ 3.74 billion, and they increased to \$ 5.8 billion by January 2008, according to the Bangladesh Bank, the central bank of the country. However, aid-dependence of the country has systematically been reduced since the beginning of 1990s (BSCAA, 2008).

Location and physical features. Bangladesh is a low-lying, riparian country located in South Asia with a largely marshy jungle coastline of 710 kilometers (440 mi.) on the northern littoral of the Bay of Bengal. Formed by a deltaic plain at the confluence of the Ganges (Padma), Brahmaputra (Jamuna), and Meghna Rivers and their tributaries, Bangladesh's alluvial soil is highly fertile but vulnerable to flood and drought. Hills rise above the plain only in the Chittagong Hill Tracts in the far southeast and the Sylhet division in the northeast. Straddling the Tropic of Cancer, Bangladesh has a subtropical

monsoonal climate characterized by heavy seasonal rainfall, moderately warm temperatures, and high humidity. Natural calamities, such as floods, tropical cyclones, tornadoes, and tidal bores affect the country almost every year. Bangladesh also is affected by major cyclones on average 16 times a decade.

It lies roughly between 20°-24° North Latitude and 88°-1° East Longitude. It has an area of 1,44,000 square kilometer. Bangladesh is situated on the northeastern side of the South Asian Subcontinent. The country's long southern coastline along the Bay of Bengal shares the Indian Ocean with India and Myanmar. It is bordered on the West by the two Indian states of West Bengal and Bihar and on the East by Assam and Myanmar. On the North of Bangladesh, Nepal, Sikkim and Bhutan and to their North sprawls the territory of Tibet in the People's Republic of China lies. In the Southeastern corner, she has a common border with Myanmar. The plains of Bangladesh are watered by one of the most remarkable network of rivers in the world the important rivers being Padma, Meghna, Brahmaputra and Jamuna. The Hills, which are located in Sylhet and the Hill Tracts Districts, are mostly low hills covered with green forests.

Climate and Seasons. Summer is hot and humid and winter is cool in Bangladesh. During the monsoon, it rains heavily and average rainfall is 136.42". The climate is characterized by moderately high temperature and it remains about eight months in the year, maximum temperature in summer ranges between 30°C and 38°C, while the minimum during the winter is 9°C. The country has six seasons. They are summer, rainy, autumn, late autumn, winter, and spring.

People. Bangladesh has a rich historical and cultural tradition and it is combining with Dravidian, Indo-Aryan, Mongol/Mughul, Arab, Persian, Turkic, and west European cultures. Residents of Bangladesh, about 98% of who are ethnic Bengali and speak Bangla, are called Bangladeshis. Urdu-speaking, non-Bengali Muslims of Indian origin, and various tribal groups, mostly in the Chittagong Hill Tracts, comprise the remainder.

Most Bangladeshis (about 88.3%) are Muslims, but Hindus constitute a sizable (10.5%) minority. There also are a small number of Buddhists, Christians, and animists. English is spoken in urban areas and among the educated.

Sufi religious teachers succeeded in converting many Bengalis to Islam, even before the arrival of Muslim armies from the west. About 1200 AD, Muslim invaders established political control over the Bengal region. This political control also encouraged conversion to Islam. Since then, Islam has played a crucial role in the region's history and politics, with a Muslim majority emerging, particularly in the eastern region of Bengal.

Bangladesh is one of the most densely populated areas of the world. The present population is about 150 million that makes it the eighth populous country of the world. The average density of population is about 1978 persons per square mile. The lowest density areas are the Hill Tracts Districts, a range of hills and thick forests and the Sundarban with 76 persons per square mile. About 86.6% of the total populations are Muslims. The other segments of the population are the Hindus, the Buddhists and the Christians. In the Indo-Pakistan-Bangladesh Subcontinent, Bangladesh has the largest Buddhist population. DRESS Light woolen in winter and cotton clothes in summer. During monsoon one should be prepared for heavy rains and it is better to carry umbrella/rain-coat.

Language. The language of Bangladesh is Bengali (Bangla). Bengali is an Indo-Aryan language it evolved from Sanskrit. Sanskrit is considered to be one of the oldest languages documented in the world. Bengali writing is a cursive script like other Indian scripts, originating from the Brahmi alphabet of the Asokan inscriptions. It contains 52 consonants and 12 vowels. English is also spoken in many places.

Health. Health issues in Bangladesh like in most poor countries of the world are not too good particularly out of the major centers. The lists of contagious and potentially deadly diseases are long, and it seems to be fear of loss of tourism revenue.

4.2 Key Places of Tourist Attractions: Region-wise Description

Bangladesh blesses with nature's finest offerings, the land of thousands of years of heritage belonging to diverse cultures of different parts of the world. People have been coming to this land of wealth for centuries from western European countries to far eastern countries. Bangladesh a revering dealt, making by the end of the journey of the three great rivers the Padma, the Meghna and the Jamuna with all its colorful people and unmatched natural beauty. The country offers a wide range of hotels and restaurants to suite the choice of the different levels of the tourists to enjoy the delicacy of any country sitting right and at the same time a variety of exciting local food of all categories and even from the streets. There are many attractions in Bangladesh to satisfy the needs of the tourists all around Bangladesh from east to west and south to north.

Main tourist attractions of the central part of Bangladesh. In the center part of Bangladesh, Dhaka– the capital was once known as the city of masque, founded by the Mughals in 1608 vibrant with more vehicles rushing through old and new locale. Shopping is fun here and trinkets and gifts are easily found in any traditional and the contemporary shops and malls. There are many interesting sites in Dhaka worth visiting. Some important places are the University of Dhaka, the Armenian Church, the Royal Ahsan Manzil, bustling Shadarghat river port on the bank of the river Buriganga, Sonargaon¹, The National Mausoleum², The National Parliament House³ and many more.

¹ the golden city and the capital of Bangle till 1611.

² at Savar which commemorates the martyrs of the liberation war in 1971.

³ the master piece of grate architect, Lui I Khan.

Main tourist attractions of the southwest part of Bangladesh. The southwest part of Bangladesh is an inescapable destination, single largest mangrove forest in the world—Sundarban, the UNESCO world heritage where finds the world's biggest cat, the Royal Bengal Tiger. Apart from the tigers the forest treasures different species of plants, reptiles, birds and mammals. People are living in and around the Sundarban by the old age traditions of wild hunt collection and fishing with otters. And yes, there is bone baby, the forest goddess protecting everyone from evils. The annual fair of Rash Purnima in the Dubla Island is yet another attraction. Then again another place—Bagerhat, is also known as the Masque city, built by Khan Jahan Ali in the 15th century. The “Shat Gambuj Masque” is one of the reminders of the once affluent city of Bagerhat. This is now the UNESCO world Heritage site as well.

Main tourist attractions of the northwest part of Bangladesh. The northwest part of Bangladesh embodies the rise and fall of Hinduism, Buddhism and Islam through changing eras. Mahastanghar is an old fortress city where Buddha had visited which was said by Buddha later. The ancient Buddhist monastery in Paharpur is biggest in the south of the Hindu layers. The architecture of Paharpur has been declared UNESCO world Heritage site. In the Rajshahi Region there are Verendra Museum, Kusumba Masque, and the Sona Masque. The famous magnificent temple city Putia was built during 1823. The Kanthajee Temple is the most ornate medieval temple in the country, which was built by Maharaja Pran Nath in 1752.

Main tourist attractions of the northeast part of Bangladesh. The Northeast zone Sylhet is also known as the land of the two leaves and the bud. Getting it'd name from the vast tea plantations blanket the hilly region. Srimongal with a concentration of 120 tea gardens is popularly known as the tea capital of Bangladesh. Shunamganj, predominantly a Haor or depressed land where millions of migratory found from Sibarica flock during winter.

Main tourist attractions of the southeast part of Bangladesh. Chittagong, the port city, is located southeast from the center. It lies on the bank of the Cornofuli River, at the edge of the Bay of Bangle. Some of the main attractions are shrine of Islamic saint Baizid Bostami, Chandanpura Masque, and the Second World War cemetery. The hill tracks of Rangamati, Bandarban and Khagrachari are holding many groups of indigenous of Mongolian ancestry with their individual cultures and customs. The fascinating beauty of these hilly regions are blue water in the Rangamati Lake, climbing up the Chimbuk hill—literally hold the clouds on hand, and the world's longest unbroken sea beach Cox's bazar. The ancient Arkan hills in the background and numbers of Buddhist temples makes Cox's bazar spiritually charged. Saint Martins island, the only crewel island in Bangladesh. All these were but only the heart what Bangladesh can offer.

These attractions may be useful to the tourists as of leisure, business and education to any other variety of desire. In fact, Bangladesh as a tourist destination has many facets. Its tourist attractions include fairs and festivals, marina, archaeological sites, islands, hill tracts, tea estates, wild life sanctuaries, mangrove forest, Bridges, resorts and many more. A brief list of the main tourist attractions are:

Fair and festivals. Baishakhi Mela (fair on the occasion of the Bengali new year), Christmas, Durga Puja (main religious festival of Hindus), Eid-e-Miladunnabi, Eid-ul-Azha, Eid-ul-Fitr, First Day of Bangla Year, Independence Day, Langalbandh Mela (a religious festival of Hindus), Mother Language Day, Muharram, Rabindra and Nazrul Jayanti, Victory Day— (16 December) etc.

Archaeological sites. Kantanagar Temple Dinajpur, Sonargaon, Shait-Gumbad Mosque Bagherhat (Sixty Dome Mosque), Lalbagh Fort, Mainamati, Mahasthangarh (the earliest urban archaeological site), Sri Chaitanya Temple, Sitakunda (Chandranath Hindu Temple), Somapura Mahaviha in Paharpur (best known Buddhist vihara in south Asia) etc.

Mangrove forest. Sundarban (also declared as a UNESCO world heritage site) located in the southern of the country.

Islands. St. Martins Island (coral island), Moheshkhali Island, Sonadia Island, Nijhum Island, Cheera Island, Dublar Char (Island).

Hill tracts. The Hill Districts (world of panoramic beauty), Khagrachari, Bandorban, Rangamati, Srimangol (also famous for largest tea garden), Tribal villages (Srimangal) etc.

Tea estates. Tea Estate (Sylhet), Laakatoorah tea estate, Khadim tea estates (Sylhet), Chittagong tea estate Bangladesh etc.

Wild life sanctuaries. Rema-Kalenga wildlife sanctuary (the largest remnant of upland natural forest in the country), Char Kukri-Mukri Wildlife Sanctuary (Bola District), Sundarban Wildlife Sanctuary, Pabla Khali Wildlife Sanctuary (Chittagong Hill Tracts), Chunati Wildlife Sanctuary (Chittagong) etc.

Bridges. Jamuna Bridge (Dhaka-Shirajgonj High Road), Lalan Shah and Hardinge Bridge, Shah Amanat Bridge (Chittagong, Bangladesh), Rupsha Bridge, Khulna, Kean Bridge - Sylhet, Bhairab Bridge, Zia Uddayan (Bridge) (Dhaka, Bangladesh), Rangamati Bridge etc.

Resorts. Pakshi Resort (Pakshi, Ishurdi, Pabna), Jamuna Resort, Lawachara Forest and Resort, Panigam Resort (Jessore), Nazimgarh Resort (Sylhet), Uni Resort (Cox's Bazar), Padma Resort, Nitol Bay Resort (Cox's Bazar), Zastat Holiday Resort (Shylet), Paradise Resort (Cox's Bazar), Quantum Meditation Resort, Nawab Palace Royal Resort (Tangail), Nilgiri Resort (Bandorban), Blue Marine resort, Meghna Village Resort, Nilima Resort

(Cox's Bazar), Coral Blue Resort (St. Martin's, Teknuf, Cox's bazar), Arunima Country Side (Norail), Tea Resort etc.

4.3 Getting into Bangladesh

Tourists and visitors are entering Bangladesh through road, train or directly fly to some destinations. It is convenient to fly to Bangladesh with direct flights available from many places.

Air. Regular international flights connect Bangladesh (Dhaka and Chittagong) with major destinations in the world. Airlines operate flights to Dhaka mostly are: **(a)** Air India—Kolkata and New Delhi, **(b)** Biman Bangladesh Airlines— Abu Dhabi, Bahrain, Bangkok, Chittagong, Cox's Bazar, Dammam, Doha, Dubai, Hong Kong, Jeddah, Jessore, Karachi, Kathmandu, Kolkata, Kuala Lumpur, Kuwait, London, Manchester, Mumbai, Muscat, Delhi, Rajshahi, Riyadh, Rome, Singapore, Sylhet, **(c)** British Airways— London, **(d)** Cathay Pacific— Hong Kong, **(e)** Dragonair— Hong Kong, **(f)** China Eastern Airlines— Beijing and Kunming, **(g)** Cosmic Air— Kathmandu, **(h)** Emirates— Dubai, **(i)** Etihad Airways— Abu Dhabi, **(j)** GMG Airlines— Bangkok, Barisal, Chittagong, Cox's Bazar, Delhi, Jessore, Kathmandu, Kolkata, Sylhet, **(k)** Gulf Air— Bahrain, Muscat, **(l)** Indian Airlines— Kolkata, **(m)** Kuwait Airways— Kuwait, **(n)** Malaysia Airlines— Kuala Lumpur, **(o)** Pakistan International Airlines— Karachi, **(p)** Qatar Airways— Doha, **(q)** Saudi Arabian Airlines— Damman, Jeddah, Madinah, Riyadh, **(r)** Singapore Airlines— Singapore, and **(s)** Thai Airways International— Bangkok and so on.

Road. Bangladesh is encircled by India on west, north and east sides except a small southeast border with Myanmar. Getting into Bangladesh by road is suitable for the travelers planning to enter Bangladesh via India⁴. The border with Myanmar is closed

⁴ Jessore, Lalm'hat, Naw'ganj, C'danga, Dinajpur, Rajshahi, Feni, Shathkhira, B'Baria, Comilla, Kurigram, Sylhet, Teknaf, M'Bazar and Hobiganj.

due to unavoidable circumstances. Regular direct (Kolkata)⁵ and indirect (Kolkata and Siliguri) bus services are available from Indian state of West Bengal and Tripura (Agartala)⁶ to Bangladesh. In case of indirect services, the land port passengers at the border entry points have to walk few hundred meters to get on the waiting buses for onward journey.

Train. Traveling by trains is also very convenient to get into Bangladesh from the state of West Bengal (Kolkata), India. The service was launched recently. After a break of 43 years, passenger train service⁷ between Bangladesh and India resumed by the first run of the Maitree (friendship) Express (Ahmed, 2008). From the commencement, one Indian train started from Kolkata for Dhaka on Saturday and returned next day. Similarly, one Bangladesh train started from Dhaka to Kolkata on Saturday and returned from Kolkata on Sunday. According to the schedule, if passengers departed for Kolkata by train, they had to spend seven days in Kolkata for the next return train. Recently, the cross-border Maitree Express train is to run on a revised schedule⁸ under a bilateral arrangement to draw more passengers staggering the frequency and reducing the total journey time⁹. Under the revised schedule, the Maitree Express starts from Dhaka on Tuesdays while from Kolkata on Wednesdays and the trains make their return journeys leaving Kolkata on Saturdays and Dhaka on Sundays adding another set of trains on the route (BSS, 2009).

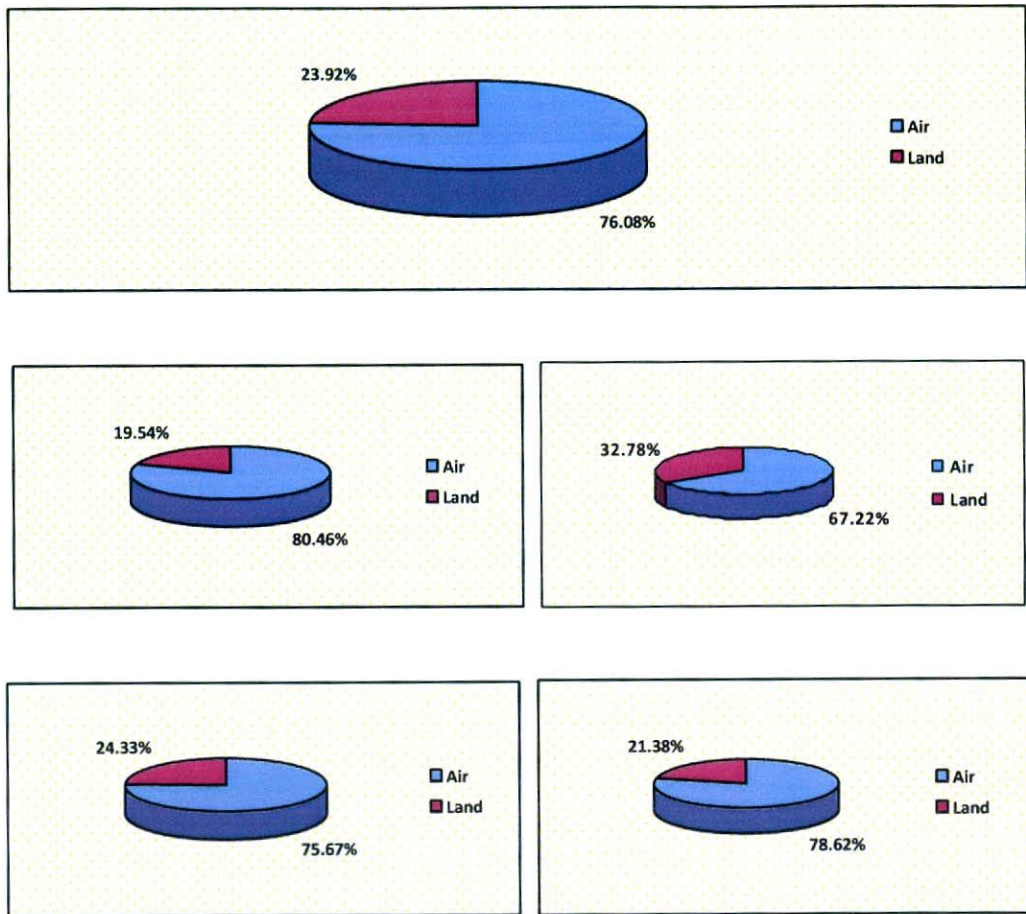
⁵ the Govt. sponsored bus service (direct) between Kolkata and Dhaka was launched on June 19, 1999 (Jyoti, 1999).

⁶ the Dhaka-Agartala bus was agreed upon on July 11, 2001 to connect Bangladesh with its eastern neighbor, the Indian state of Tripura, which has a substantial Bengali population and indigenous peoples who have close commercial and cultural links with the people of eastern Bangladesh (BBC, 2001).

⁷ on Monday 14, 2008 Dhaka-Kolkata passenger train service whistle-started on Pahela Baishakh, the first day of Bengali New Year when people at both ends had euphoric celebrations.

⁸ from August 1, 2009.

⁹ according to Bangladesh Railway officials and an Indian High Commission statement, the Maitree Express would now operate four days of a week under a changed timetable that would reduce the total journey time by 1.15 hours and by 1.45 hours during the Dhaka-Kolkata and Kolkata-Dhaka journeys in the route.

Figure: 4.1 Tourist Arrivals by Ports (Mode) during 2004 to 2007

Source: Table 4.1 in the Annex.

The number of international tourist arrivals in Bangladesh for which data are available during the year 2004-2007 by air (76.08%) and by road (23.92%) for the purpose of tourism. It is evident here that in one side tourists arrived in the country by air has been increased every years and on the other side tourists arrived by land ports has been slid decreased during the last three years. [Table: 4.1]

4.4 Roaming Around Bangladesh

Tourists have many options to move around within the country for covering the distances by taking flights to limited destinations, pleasing train journeys to certain destinations, hiring a taxi or traveling by buses to all most every destinations or using charming cruisers¹⁰.

Flights. An airway is the most convenient way of traveling in Bangladesh to few selective destinations. Regular flights connect Dhaka, with other important cities of the country like Chittagong, Cox' bazar, Jessore, Sylhet, Barishal, and Rajshahi. National (Biman) and few privately operated airlines (GMG, United, Best, Parabat etc.) offer flights almost every day to these places at relatively affordable rates.

Trains. Traveling by trains is also very convenient to some extent but it is not widespread to around the country on all routes as due to existence of two different types of gauges¹¹. Furthermore, luxury (air-conditioned), economy (well managed) and general¹² compartments are added extra value to the tourists and the travelers as the routes perhaps circuitous compared to bus routes to the same destinations. The central railway station of Bangladesh is Dhaka Kamlapur Rail Station from where train services are available to many places of the country.

Taxis and buses. Roads are not modern and not well maintained and generally crowded particularly in big cities in Bangladesh. Buses are mostly overcrowded. Still there are many luxurious bus services available on some important routes from Dhaka to most important places of the country like division cities– Chittagong, Rajshahi, Khulna, Sylhet, Barishal and some more district cities– Cox's Bazar, Jessore, Bogra, Comilla, Rangamati

¹⁰ to reach certain places there is no alternative but to use boats or other water vehicles like ferry, engine operated big country boat, steamers etc.

¹¹ broad gauges found mostly in the southern and the north-western part and meter gauges found in the eastern and north-eastern part of the country.

¹² over crowded in these regions of the world.

etc. Moreover, different types taxicab and rent-a-car services are also available within the major cities in particular yellow (air-conditioned), black and blue (non air-conditioned) and many luxurious cars, vans, etc.

Boats. Bangladesh— the land of rivers marked as the physiographic of the nation and has at least 700 big and small rivers in number generally flow south. Obviously, boats are the traditional means of transport for the country people. Country boats are generally used for fishing, but people also use them for commuting through waterways. Mechanical boats are also available in many places and they are safer than the country boats. Recently, many tour operators have started offering riverside boat trips. For instance, Rocket (Steamer) Service between Dhaka-Barisal-Khulna is amazing to enjoy the riverside scenes of Bangladesh.

Hotels. The hotels in Bangladesh as an oasis of comfort, luxury, tranquility, and convenience— satisfy every tourists and business travelers with its relaxed and congenial atmosphere. There are a number of graded hotels in Bangladesh mostly in the major cities, offering expensive five-star accommodation (Sonargaon, Peninsula, Sea Palace, Seagull etc.) to enjoy lavish surroundings with great services which are the part of a global hotel chain (Westin, Radisson, Sheraton etc). Smaller cities may not offer quite such luxuriant accommodations, but they certainly have more kindness. There are also some accommodations which offer one to four-star ratings services (Dhaka Regency, Hotel Purbani, Hotel Sunderban etc.). The services of these hotels may be somewhat different from the expectation of the tourists in positive sense. However, tourists should be able to find a variety of hotel accommodations¹³ across the country that will suit the needs and purse quite comfortably.

Restaurants. Restaurants in the country offer a wide range of options to suite the tourist's choice with a great selection of eating places as an ideal spot to satisfy the

¹³ for those who are concern on budget, there are a number of cheap hotels available in Bangladesh.

needs and wants of the tourists. In order to take the pleasure for delightful dining experience, one can find enthusiastic to conjure up the most exciting cuisines in the city. Bangladesh's restaurants cater an immense variety of fare adopted from worldwide culinary artistry considering the traditional Bangladeshi cuisine with the spicy flavoring and mouthwatering smells to a wide variety of international dining which include Asian, European, Mediterranean, and American cuisines. Above all in the big cities, Bangladesh enjoys the widest variety of restaurants. Western meals are often served in major hotels and in some cases in top-quality restaurants in the major cities of the country. However, whatever tourist's preferences, Bangladesh has a restaurant to all tastes for them.

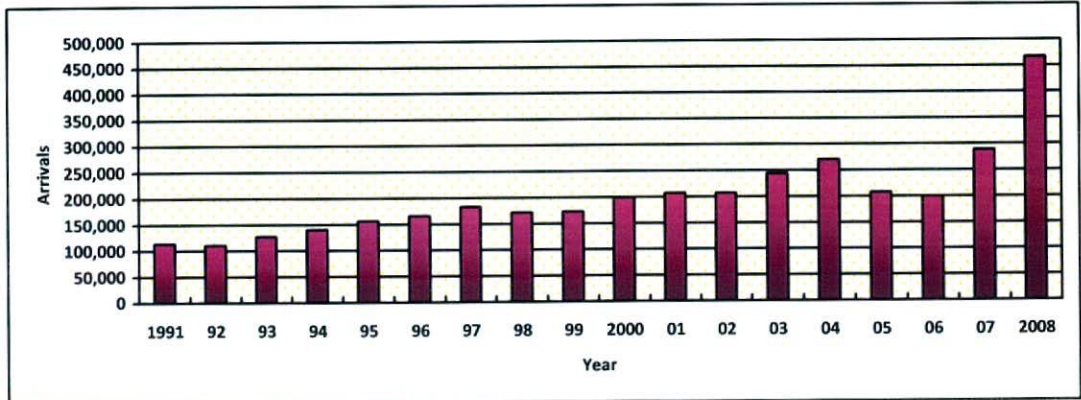
4.5 International Tourist Arrivals and Tourism Receipts in Bangladesh

The tourism activity generates significant economic benefits to tourists' host and home countries alike (SESRIC, 2008). Particularly in the developing country like Bangladesh, one of the crucial incentives for the country to endorse itself as tourist destination is the probable economic improvement, primarily through foreign exchange earnings and the generation of employment and business opportunities.

International tourism has recently shown sustained growth in both revenues and the number of tourists, and has left broad economic, social, cultural, and environmental footprints reaching almost every part of the globe. Many international tourists do not consider Bangladesh as yet a destination for their holiday. While business is still the predominant purpose of visiting Bangladesh, crews of international ships, missionaries and students are increasingly visiting this country over time. The second most important purpose is business and leisure, followed by vacation leisure (Kyaw Oo, 2008). Since international tourism is typified by a rising tendency for tourists to visit new destinations, and mutually with the tourism product diversification and increasing competition, new destinations are gradually growing at a more rapidly and escalating their share in the world market. International tourist arrivals in Bangladesh increased in

absolute terms from 34,580 in 1972 to 115,369 in 1990, 199,211 in 2000 and 467,332 in 2008. However, the trend has fluctuated widely, recording even negative growth rates in some years. [Table: 4.2]

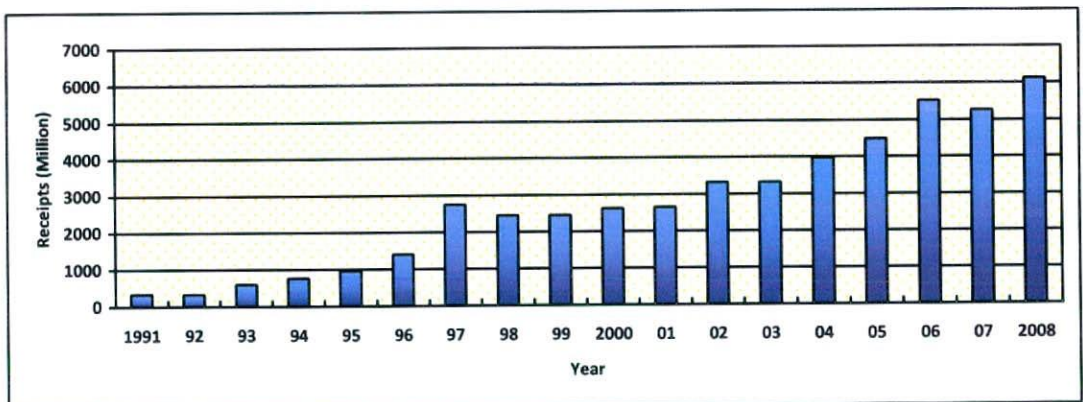
Figure 4.2: International Tourist Arrivals in Bangladesh during 1991 to 2008



Source: Table 4.2 in the Annex.

Over the last decade, the number of international tourist arrivals in Bangladesh increased from about 113,242 in 1991 to 199,211 in 2008, corresponding to an average annual growth rate of 6.73%. In the same period international tourism receipts increased from BDT 331.50 million to BDT 2,627.0 million, equivalent to an average annual growth rate of 30.26%. [Table: 4.2]

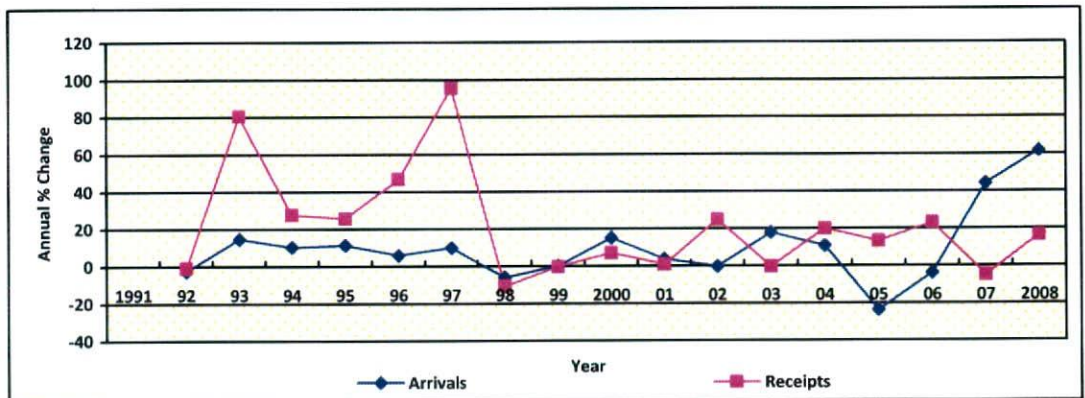
Figure 4.3: International Tourist Receipts in Bangladesh during 1991 to 2008



Source: Table 4.2 in the Annex.

The number of international tourist arrivals in Bangladesh, for which data are available, increased by 4.01% in 2001. The 207,199 arrivals hosted by the country surpassed the previous record of the year 2000 and generated BDT 2,653.8 million as international tourism receipts, corresponding to an increase by 1.02%. [Table: 4.2]

Figure 4.4: International Tourist Arrivals and Tourism Receipts in Bangladesh (Annual % Change) during 1991 to 2008



Source: Table 4.2 in the Annex.

In 2002, the number of international tourist arrivals in the country, amounted to 207,246 with an annual growth rate of .02% over the previous year and international tourism receipts in the same year amounted to BDT 3,312.6 million, corresponding to an increase by 24.82% over the year 2001. [Table: 4.2]

Consequently in 2003, the number of international arrivals in the country increased by 17.98% to 244,509. This was mainly due to the increase of 37.26 thousand arrivals during the year. Yet, international tourism receipts in the country amounted to BDT 3,310.0 million, corresponding to a slid decline by 0.08% over 2002. [Table: 4.2]

The year 2004 was unquestionably better than 2003, the country reached 271,270 arrivals, corresponding to an increase by 10.94% over the previous year and

international tourism receipts amounted to BDT 3,967.6 million in the same year, corresponding to an increase by 19.87% over 2003. [Table: 4.2]

In contrast, it seems that international tourism in Bangladesh was somewhat affected in 2005 onwards by the negative factors of internal political and social turbulence. Therefore, the number of international tourist arrivals in the country decreased by 23.45% to 207,662. But international tourism receipts amounted to BDT 4,493.9 million was recorded in the same year, corresponding to an increase by 13.27% compared to the last year. [Table: 4.2]

Due to Tsunami in the Indian Ocean and other negative factors such as oil price increases, exchange rate fluctuations, and specially economic and political uncertainties, the current available data for 2006 show that the number of international tourist arrivals in Bangladesh again slid decreased by 3.54% to 200,311. In contrast, Bangladesh reached BDT 5,531.5 million in 2006 as international tourism receipts, corresponding to an increase by 23.07% over the level of 2005. [Table: 4.2]

In 2007, the industry recovered the downward trend in tourist arrivals in the country. International tourist arrivals in the country reached a record of 289,110 with a growth rate of 44.33% compared to the previous year. But in case of international tourism receipts, BDT 5,265.2 million recorded in the same year, corresponding to a slide decrease by 4.80% compared to the previous year 2006. [Table: 4.2]

In accordance with the most recent estimates of the Ministry of Tourism and Civil Aviation of the Government of Bangladesh, the country continued its vigorous performance of the past years and enjoyed its second consecutive year of sustained growth with the total number of tourists reaching over 467,332 in 2008 and set a new record in term of international tourist arrivals, corresponding to an increase by 61.65%

over the year 2007 and generated BDT 6,124.5 million as international tourism receipts with a annual growth of 16.32% over the year 2007. [Table: 4.2]

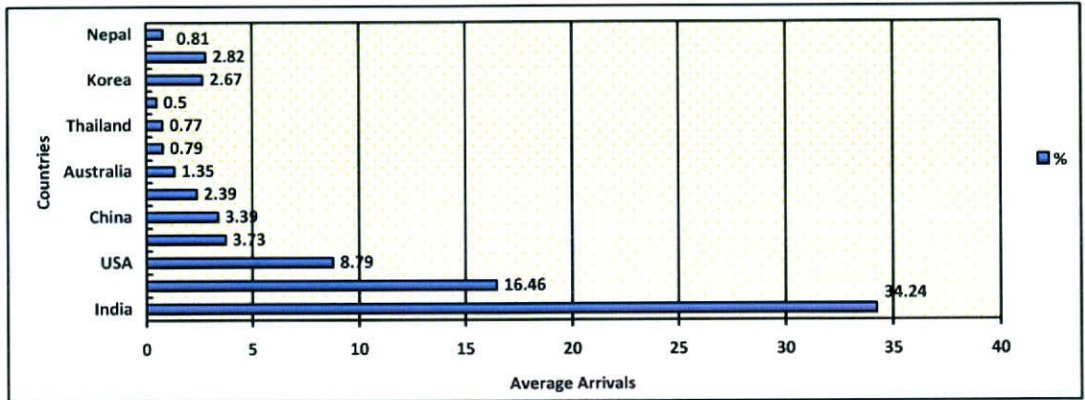
4.6 Tourists' Trends

A WTO survey found that only 25% of the sample tourists considered Bangladesh as a location for real tourist destination. According to the tourists' opinions, improvements in transportation and hotel facilities are the most important areas requiring attention from the government for encouraging tourist arrivals in Bangladesh. Improvement in the customs facilities, greater dissemination of tourist information, and greater availability of sports and recreation facilities were also mentioned as important areas requiring government interference. One-third of the tourists visiting Bangladesh are either entrepreneurs or proprietors, who constitute 43% of Asian nationals and 21% of non-Asians visiting Bangladesh. The average length of stay of international tourists in Bangladesh is less than 10 days (Kyaw Oo, 2008).

Inbound tourists. Travel choices and travel needs are influenced by many factors, including discretionary income, available holiday time, age, cultural background, and previous travel experience. The primary motivation for planning a holiday also affects a tourist's choice of destination (TA, 2008). At individual country level, it is observed that international tourists arrived in Bangladesh are still concentrated in few countries¹⁴ and India, United kingdom (UK), United States of America (USA), Pakistan, China, Korea and Japan are found in top-10 list of the international tourist arrivals in Bangladesh since 2001 for which data are available, corresponding to an average share of 72.10% of total inbound tourism in Bangladesh. [Table: 4.3]

¹⁴ particularly India, United kingdom, United States of America, Pakistan, China, Canada, Australia, Malaysia, Thailand, Germany, Korea and Japan.

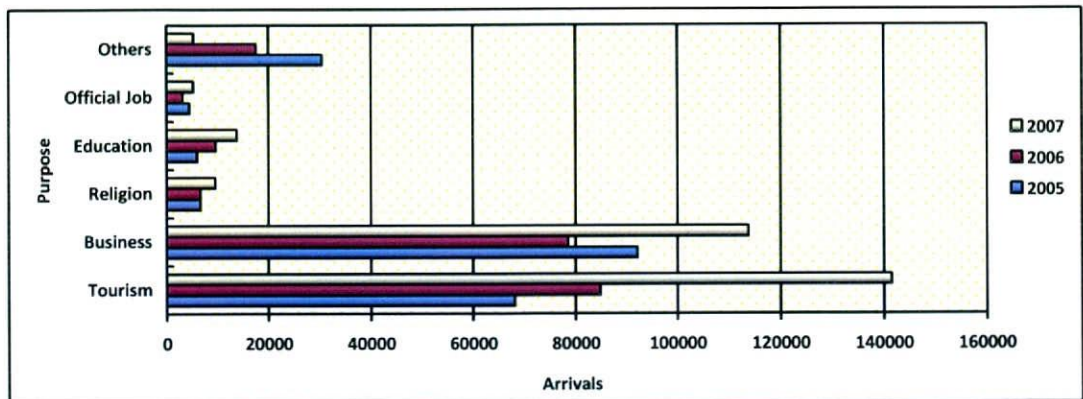
Figure 4.5: Inbound Tourism in Bangladesh: Top Ten Originating Countries during 2001 to 2007



Source: Table 4.3 in the Annex.

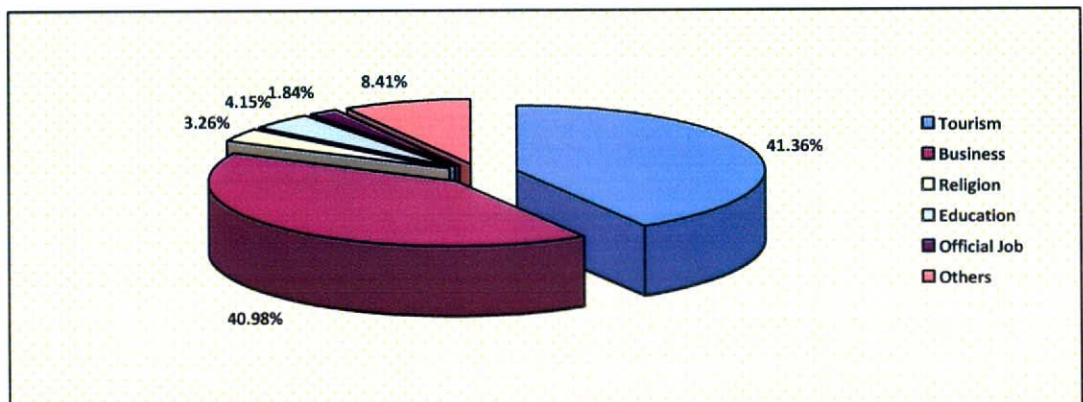
Statistics for 2001 to 2007 indicate that tourists from India visiting Bangladesh comprise on an average of 34.24% of the entire inbound traffic¹⁵ during the period followed by UK (16.46%), USA (8.79%), Pakistan (3.73%), China (3.39%), Japan (2.82%), and Korea (2.67%). One of the reasons for the maximum numbers of tourists visiting Bangladesh from India is to meet relatives and other family members residing in the country. It is interesting to note that compared to 2005, the shares of India in tourist originating market in Bangladesh decreased from 41.53% to 31.21% in 2006 and compared to 2006 the shares decreased 31.21% to 27.18% in 2007, despite of overall remarkable increase of arrivals. Arrivals from USA and UK are occupying considerable position in tourist originating market of Bangladesh due to an increased number of Bangladeshi families living abroad returning for family reasons. However, the top-10 originating countries together hosted 75% to 80% of total tourist arrivals in the country during the period 2001 to 2007. [Table: 4.3]

¹⁵ around 38% in 2001, 39% in 2002, 35% in 2003, 30% in 2004, 42% in 2005, 30% in 2006 and 27% in 2007.

Figure 4.6: Inbound Tourism by Purpose during 2005 to 2007

Source: Table 4.4 in the Annex.

Moreover, Bangladesh recently achieved Approved Destination Status (ADS) of the People's Republic of China. In 2007 visitor arrivals from China increased by 69.29% compared to 2006 and it is expected that China shall continue to hold the position as one of the top tourist generating market for Bangladesh (BPC, 2007). [Table: 4.3]

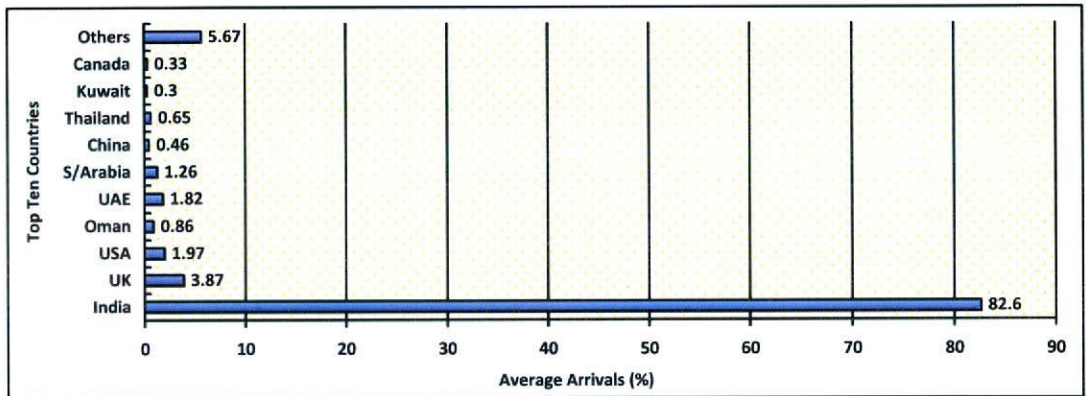
Figure 4.7: Average (%) Inbound Tourism by Purpose during 2005 to 2007

Source: Table 4.4 in the Annex.

Statistics for 2005 to 2007 indicate that on an average 41.36% of tourists arrived Bangladesh for the purpose of tourism followed by business (40.98%), education (4.15%), religion (3.26%), and official job (1.84%) purposes. [Table: 4.4]

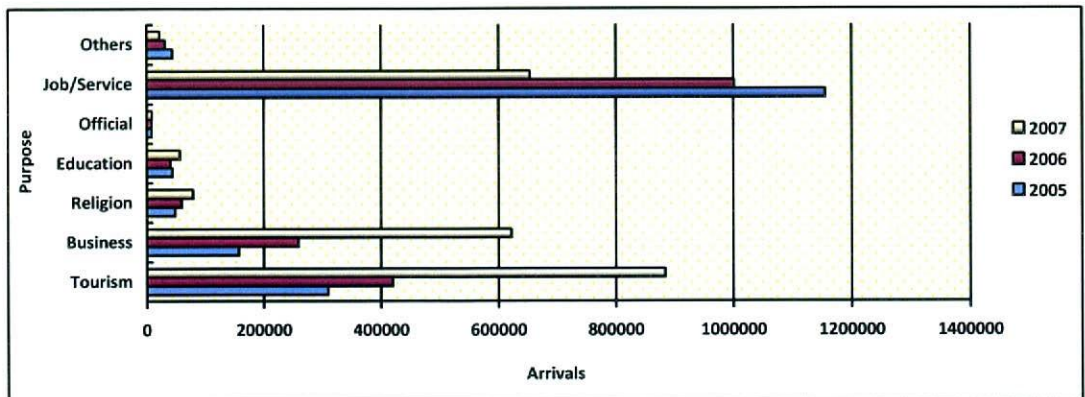
Outbound tourism. Outbound travels of Bangladesh nationals have been growing constantly for the last few years. On account of the cultural links and good communication networks with India, Bangladeshis have chosen India as an attractive tourist destination (Ahmad, 2008). Over 4.8 million tourists from Bangladesh visited India, which constitutes over 82.30% on an average of the total outbound tourists during the period 2005 to 2007, simply because of the proximity and having 16 different boarder check posts between the countries. [Table: 4.5]

Figure 4.8: Outbound Tourism in Bangladesh: Top Ten Destination Countries during 2005 to 2007



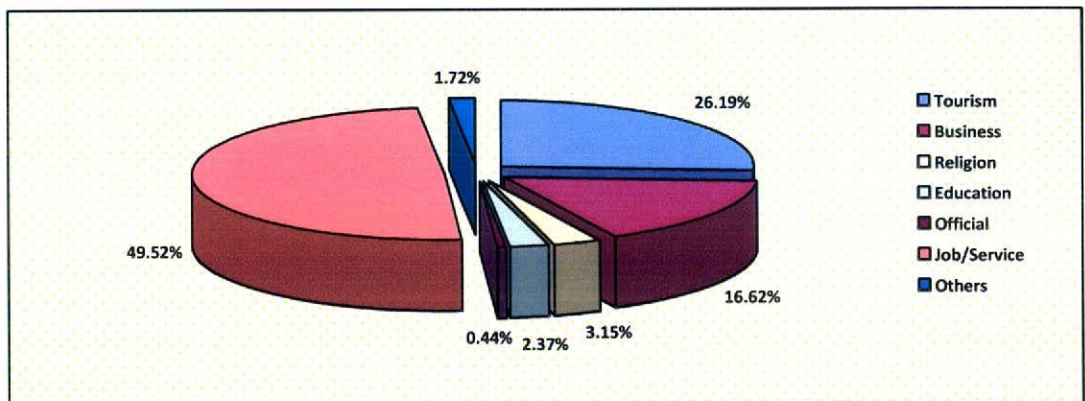
Source: Table 4.5 in the Annex.

In contrast, on the basis of an average share among the outbound destination countries during the period 2005 to 2007 UK (3.86%), USA (1.97%), UAE: United Arab Emirates (1.82%), KSA: Kingdom of Saudi Arabia (1.26%), Oman (0.85%), Thailand (0.65%), Kingdom of China (0.46%), Pakistan, Japan, and Kuwait/Canada are the top 10 tourist destinations for our nationals. [Table: 4.5]

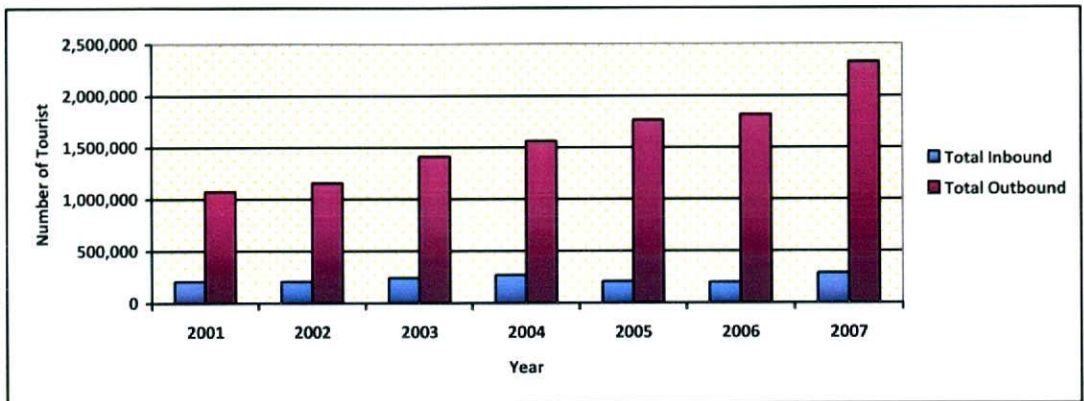
Figure 4.9: Outbound Tourism by Purpose during 2005 to 2007

Source: Table 4.6 in the Annex.

The total number of people travelling abroad was a little less than 6 million of which on an average 49.52% was for job/service followed by tourism (26.19%), and business (16.62%) purposes. Tourists for religious purposes were on an average 3.15% followed by education (2.37%), official 0.44%), and other travels (1.72%) purposes that includes visiting relatives and friends (VRF). [Table: 4.6]

Figure 4.10: Average (%) Outbound Tourism by Purpose during 2005 to 2007

Source: Derived from Table 4.6 in the Annex

Figure 4.11: Total Inbound and outbound Tourism of Bangladesh during 2001 to 2007

Source: Table 4.7 in the Annex

From this analysis, it has been evident that Bangladesh is way behind regarding attracting tourists for the development of tourism in the country, despite the potential of becoming a recognized tourist destination. On the other hand, Bangladeshis who went out of the country for tourism purpose is a positive sign and related to the growth of our country economy [Table: 4.7]. Mansur (2007) acknowledged this issue and stated that this development happened despite the fact that there is no official procedure to transfer fund to the overseas agents to cover the cost of the outbound groups.

4.7 International Regional Cooperation

Globalization and regionalization are dominant trends in the world economy, stimulating economic integration and new forms of cooperation that affect the operation of the tourism industry (Henderson, 2001). In recent times regional cooperation has become a significant aspect of the world trading system and this trend towards regionalization is also found noticeably in international tourism. Almost all countries in the world are now members of at least one or more groups. According to the WTO, the number of such arrangements (RTA) has surged since the early 1990s. There are some 386 agreements notified as of December 2006 and still more in the pipeline. By the year 2010, it is

estimated that close to 400 regional trade agreements will be in existence (Wijayasiri and Mel, 2008). *Much of the literature is concerned with international economic relations* (Grugel and Hout, 1999; Lloyd, 1999), but regionalism has considerable implications for tourism. In one study Thein (2005) stated that neighboring countries triggered for pooling their financial and human resources, and establishing cost-effective regional joint marketing and promotion programs due to the reduced marketing budgets and tourism downturns. For instance, the Agency for Coordinating Mekong Tourism Activities (AMTA), Regional Tourism Organization for Southern Africa (RETOSA), the Caribbean Tourism Organization (CTO) and the South Pacific Tourism Organization (SPTO) are the successful regionalization¹⁶ in the recent years (ADB, 2004). In fact this term is frequently applied to the sub-national unit (Pearce, 1995) and its administrative structures (Pearce, 1992) rather than the cross-border linkages and regional development is seen as a means of ensuring a fairer distribution of the benefits of tourism (Pearce, 1997). Basically this effort is expected for the sustainable growth of tourism industry and Bangladesh is not an exception to this trend. The country has signed up to various regional trade agreements considering the above fact.

SAARC. The centuries old civilization, affluent and exclusive cultural diversity, exquisite gastronomy invitation, exceptionally diverse and vast array of geography, wonderful archaeological monuments, historic sites of religious worth, and above all very friendly people of South Asia, make the region a very attractive place for intra-regional as well as worldwide tourism (Islam, 2008). Development of tourism in SAARC region was acknowledged for the common benefit of all the member countries. Realizing the importance of tourism (Raghavan, 1995), a Technical Committee¹⁷ (TC) was established

¹⁶ other major examples include featuring Cambodia, Laos, Myanmar, Thailand, Vietnam and Yunnan Province in China; Mundo Maya which unites Belize, El Salvador, Guatemala, Honduras and Mexico; and Bodensee-Tourismus GmbH which markets the Swiss, Austrian and German areas around Lake Constance.

¹⁷ the first meeting of SAARC Tourism Ministers held in Colombo in September 1997, decided to launch the Scheme with immediate effect. All issues relating to the Scheme are addressed by the SAARC

in 1991 to promote cooperation in the field of tourism and decided to produce¹⁸ joint brochures, videos, and travel guides, etc. Accordingly, the member states of SAARC at all levels with emphasis on intra-SAARC tourism have taken the necessary efforts. Some of this has been done, but has little impact, due to problems beyond the control of the tourism industry (Wijayasiri, 2002). Afterward, Islamabad Summit¹⁹ examined the development of tourism within South Asia that brings economic, social, and cultural dividends. The year 2006 was designated as South Asia Tourism Year as stated by the declaration of Dhaka Summit²⁰ and undertakes a plan of activities to encourage the private sector entities in promoting understanding and harmony in the region. In consequence, the action plan includes the promotion of: **(a)** SAARC as a common tourist destination, **(b)** the role of private sector, **(c)** human resource development, **(d)** south Asian identity through tourism, **(e)** cultural and eco-tourism development, and **(f)** implementation of the action plan. However, the development of tourism between seven original (Bangladesh, Bhutan, India, Maldives, Nepal, Pakistan, and Sri Lanka) and one new member (Afghanistan) is not only going to help develop movement of people within the region, but would also attract people from outside the region (Siddiqi, 2005). As a result tourism is supposed to play an effectual role in driving South Asian relations to new heights and consequently it is wise to remove all barriers to tourism development in this region (Ahmed and Ahmed, 2005).

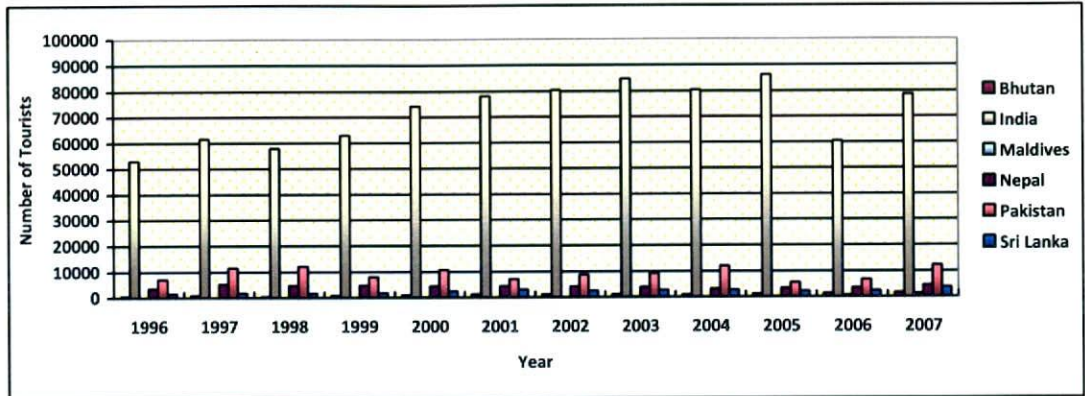
International tourism considering the SAARC region has recently shown unsustainable growth in both tourism receipts and the number of tourist arrivals in Bangladesh. Yet the country has extensive potentialities to host the tourists coming from the member countries of this treaty due to almost familiar cultural values, life style, tastes, and interests. [Table: 4.8]

Technical Committee on Tourism. The Scheme is specifically aimed at facilitating intra-regional tourism.

¹⁸ at its first meeting in Colombo, October 1991.

¹⁹ held in Islamabad, January 2004.

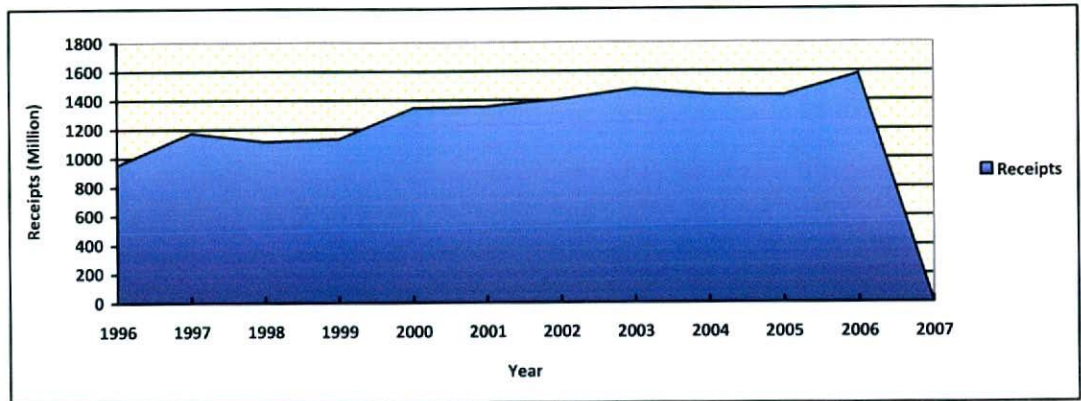
²⁰ held in Dhaka, November 2005.

Figure 4.12: Tourists' Arrivals in Bangladesh from SAARC Region during 1996 to 2007

Source: Table 4.8 in the Annex.

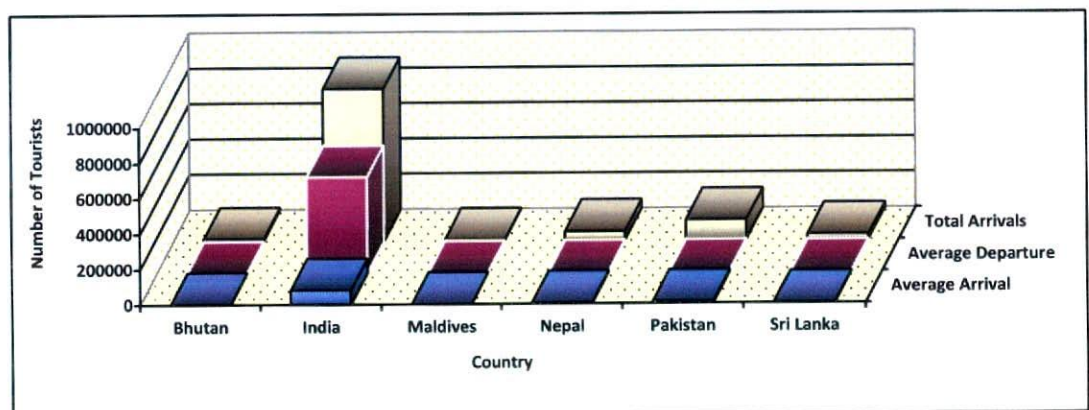
Exploring the number of international tourist arrivals from SAARC region in the country may show the actual situation prevailing in the tourism industry of Bangladesh. The number of international tourist arrivals in the country from other member countries, for which the data are available, increased from 65,892 in 1996 to almost 93,012 in 2000, corresponding to an average annual growth rate of 9.64%. In the same period Bangladesh generated BDT 1347.62 in 1996 compared to BDT 954.69 million in 1996, corresponding to the same average growth rate of 9.64%. [Table: 4.8]

During the year 2001 to 2003, the number of international tourist arrivals in Bangladesh from SAARC region increased by 0.85%, 3.62%, and 5.04% respectively over the particular previous year. In contrast, during the year 2004 to 2006 frustratingly tourist arrivals decreased by 2.65%, .03% and 24.11% respectively over the particular previous years. In terms of tourism receipts in this region during the year 2001 to 2006 Bangladesh earned BDT 8699.58 in total with an average annual growth rate of 2.76%. The year 2007 unquestionably better than prior years where tourist arrivals in the country from this region reached 102,049 and set a new record in terms of international tourist arrivals, corresponding to an increase by 35.81% over the year 2006. [Table: 4.8]

Figure 4.13: Tourism Receipts in Bangladesh from SAARC Region during 1996 to 2007

Source: Table 4.8 in the Annex.

Bangladesh hosted 1,063,879 tourists in total from the SAARC region during the year 1996 to 2007. At individual country levels, it is observed that India (858,747) accounted for the largest number of tourist arrivals from SAARC countries in Bangladesh followed by Pakistan (110,692), Nepal (49,761), Sri Lanka (28,865), Bhutan (12,496), and Maldives (3,318). [Table: 4.8]

Figure 4.14: Tourist Arrivals over Departure of Bangladesh in SAARC Region during 1996 to 2006

Source: Table 4.9 in the Annex.

In terms of tourist arrivals over departure of Bangladesh in SAARC region during the year 1996 to 2006 for which the data are available depicted that 449,311 Bangladeshi tourists visited other member countries. At individual country levels in term of average departure during the year 1996 to 2006 for which the data are available from Bangladesh to other SAARC countries, it is observed that India (542,354) accounted for the largest number of tourist departures from the country followed by Pakistan (3,567), Nepal (1,314), Sri Lanka (1,095), Bhutan (123), and Maldives (34). [Table: 4.9]

But Bangladesh is not getting all benefits through all these efforts as expected since its inception. Still the country is unable to attract and increase steadily more regional tourists from all of the member countries. Finally, Colombo Summit²¹ agreed to make every effort for facilitating the movement of people through improved travel infrastructure and air, sea, and land connectivity among the SAARC countries, collaboration in human resource development and the promotion of SAARC as a common destination through public-private partnerships and joint campaigns.

BIMSTEC. The Regional grouping, the government of People's Republic of Bangladesh, the Republic of India, the Union of Myanmar, the Kingdom of Nepal, the Domestic Socialist Republic of Sri Lanka, and the Kingdom of Thailand was formed the Bay of Bengal Initiative for Multi-Sector Technical, and Economic Cooperation²² (BIMSTEC) in 2004 with a \$810 billion economy, sharing about 22% of world population and 3.64% of surface area (De, 2008). As a fusion of two regions, namely, South and Southeast Asia, BIMSTEC aims to develop a network of complementarities, facilitating greater economic cooperation (Khan and Haque, 2007). To achieve this goal, seven members of BIMSTEC

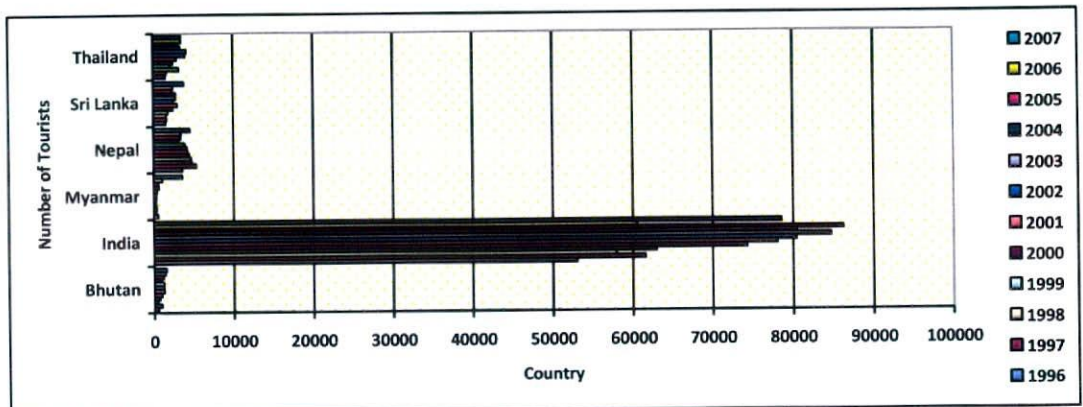
²¹ held in Colombo, August 2008.

²² in 1997, BIST-EC (Bangladesh, India, Sri Lanka, and Thailand Economic Cooperation) was formed in Bangkok. Myanmar joined the organization as a full member in late 1997 by the approval of a special Ministerial Meeting held in Bangkok and upon which the name was changed to BIMST-EC (Bangladesh, India, Myanmar, Sri Lanka, and Thailand Economic Cooperation). Then Nepal and Bhutan was given full membership in 2003. As a result in the first Summit on 31 July 2004, the new name BIMSTEC was agreed by its leaders.

covers 13 Priority Sectors²³ led by member countries in a voluntary manner including transport and communication, tourism, cultural cooperation, and people-to-people contact.

Bangladesh hosted 994,169 tourists in total from the BIMSTEC region during the year 1996 to 2007. At individual country levels, it is observed that India (858,747) accounted for the largest number of tourist arrivals from BIMSTEC countries in Bangladesh followed by Nepal (49,761), Thailand (35,383), Sri Lanka (28,865), Bhutan (12,496), and Myanmar (8,917). [Table: 4.10]

Figure 4.15: Tourists' Arrivals in Bangladesh from BIMSTEC Region during 1996 to 2007



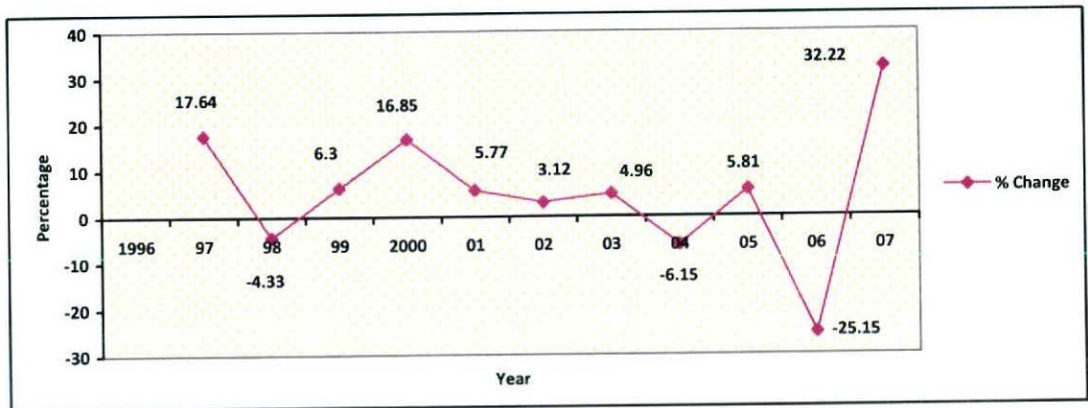
Source: Table 4.10 in the Annex.

The share of Bangladesh was much less than that of other South Asian countries in the total tourist arrivals. During 1996 to 2007, international tourist arrivals from the BIMSTEC region had grown at an average rate of 5.19%. Bangladesh as a member of this group has taken negligible role in the field of tourism development although it provides

²³ thirteen priority sectors— Trade and Investment, Technology, Energy, Transport and Communication, Tourism, Fisheries, Agriculture, Cultural Cooperation, Environment and Disaster Management, Public Health, People-to-People Contact, Poverty Alleviation, and Counter-Terrorism and Transnational Crimes.

enormous tourist arrivals, tourism receipts, and employments to some member countries. [Table: 4.10]

Figure 4.16: Percentage Change in Tourists' Arrivals in Bangladesh from BIMSTEC region during 1996 -2007



Source: Table 4.10 in the Annex.

Bangladesh needs to explore tourism activities– it needs appropriate logistic, infrastructural facilities, and entrepreneurship development in the tourism sector (Ali, 2008). At this point this regional cooperation can bring benefits for Bangladesh. Since the launching of the BIMSTEC in 1997, Myanmar and other member countries are approaching Bangladesh as their tourist destination.

SASEC. Tourism has been identified as one of the priority areas for cooperation under the South Asian Sub regional Economic Cooperation (SASEC) program (ADB, 2008). The SASEC was launched in 2001 (CNBC, 2007) following a request by the SAGQ– South Asia Growth Quadrangle (UNB, 2006) by Bangladesh, Bhutan, India²⁴ Nepal, and later Sri Lanka²⁵ (Palit and Islam, 2008) with the support of Asian Development Bank, aiming to

²⁴ north and eastern states of India– West Bengal, Bihar, Uttar Pradesh, Orissa, Jharkhand, Assam, Meghalaya, Manipur, Tripura, Mizoram, Nagaland, Arunchal Pradesh, Sikkim.

²⁵ Sri Lanka has joined in November 2005.

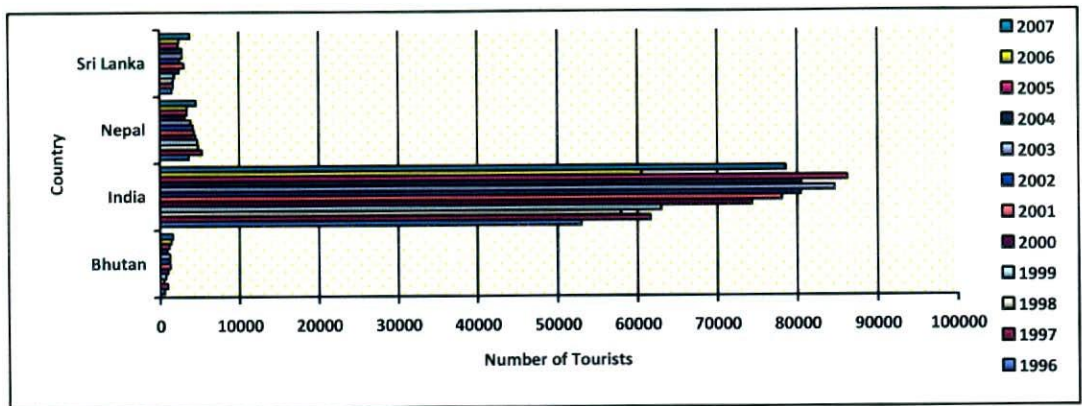
promote the sub-region's economic cooperation in the priority areas²⁶, including transport, tourism, and information and communication technology (Karim, 2007). It provides a venue for policy dialogue, information sharing, confidence building, and the development of environmentally and culturally sustainable and socially inclusive tourism among participating countries to enable better economic cooperation (NBN, 2007).

The SASEC's tourism working group has identified the need for a sub-regional tourism master plan, with ecotourism and Buddhist-based tourism as common themes in an effort to boost the participatory nature of the project, all stakeholders in the tourism industry including the public and private sectors, will be involved in developing the framework of the plan which the plan should revolve, the release states (THBL, 2004). In addition, it will set up the SASEC regional research and training network to facilitate the flow and integration of information, knowledge, and services among member countries through directly linking communities, businesses, and research institutes.

Uddiin (2005) stated that the demand for travel in Asia is expected to reach 231 million by 2010 from its current 116 million that will leave beneficial economic impacts for countries of the region. However, the seventh meeting of tourism working group of SASEC formed strategies to jointly promote tourism in the sub-region (Nepalnews, 2006). As a result this regional cooperation can also bring benefits for Bangladesh.

[Table: 4.11]

²⁶ six priority sectors– energy and power, environment, information and communication technology, tourism, trade, investment, and private sector cooperation and transport.

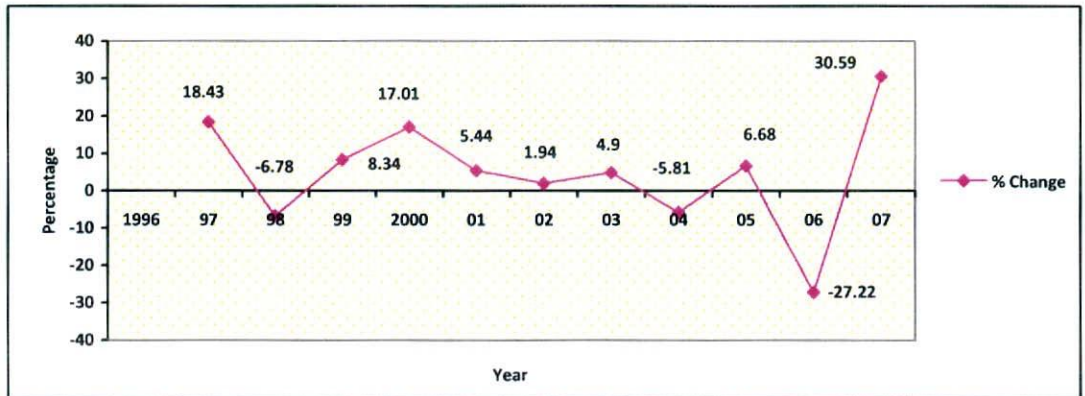
Figure 4.17: Tourists' Arrivals in Bangladesh from SASEC Region during 1996 to 2007

Source: Table 4.11 in the Annex.

Since the launching of the SASEC in 2001, tourist arrivals in Bangladesh from the member countries have slide back for internal socio-economic and environmental issues, and political crisis but recently it has been found the growing trend in this regards. Sri Lanka and other member countries are approaching Bangladesh more as their tourist destination. [Table: 4.11]

During 1999 to 2006, international tourist arrivals had grown at an average rate of 8%, much higher than the world average. In 2007, tourism earnings from international visitors totaled \$12.3 billion, representing a 150% increase from the tourism earnings of 2003, and tourism employed directly 13.76 million people in the three countries considering the entire India (Cezayirli, 2008). In contrast, Bangladesh attracts very few backpackers and budget tourists due to complicated visa formalities and perceived difficulties of travel.

Figure 4.18: Percentage Change in Tourists' Arrivals in Bangladesh from SASEC Region during 1996 to 2007



Source: Table 4.11 in the Annex.

The analysis of international tourism receipts revealed that despite fluctuations over time, foreign exchange earnings from tourism in Bangladesh increased from Tk. 15.5 million in 1972 to Tk. 302.9 million in 1990, registering an average growth rate of 24% per annum. The contribution of tourism receipts to GDP was low, ranging between 0.1% and 0.2% during the 1980s. Tourism receipts also constituted only 2% to 3% of export earnings of Bangladesh during the same period. The analysis of the expenditure pattern of the international tourists in Bangladesh shows that expenditures were highest on shopping and souvenirs, followed by hotels, services and transport (Kyaw Oo, 2008).

Nevertheless, growth rates in some years both for the international tourist arrivals and the international tourist receipts appear remarkably in numerical figures. The most dynamic element of the sector in Bangladesh is domestic and Indian tourism. In terms of absolute figure it comes into sight a frustrating performance compared to even neighboring countries although Bangladesh is tied with them through various regional cooperation relationships. Rapid growth in these market segments is helping to build infrastructure for possible future international tourism (SASEC 2007).

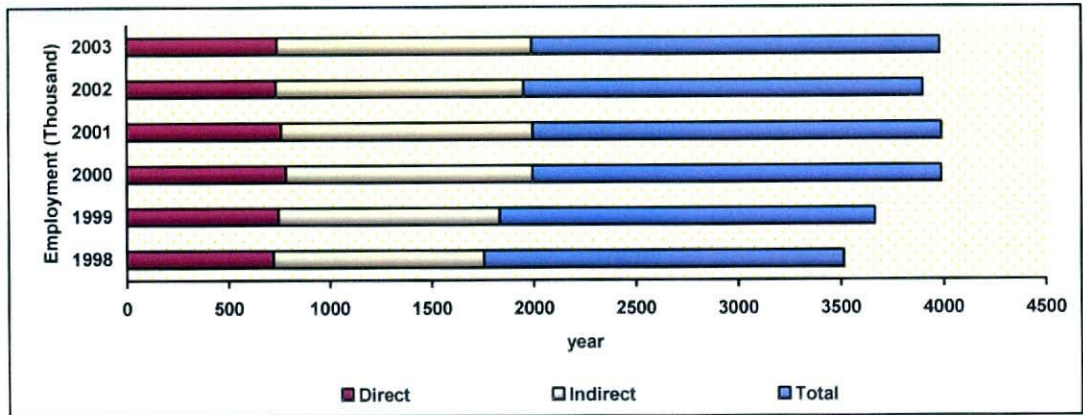
Above analysis, thus, suggest growth as a vehicle for regional tourism development in particular, using the example of SAARC, BIMSTEC, and SASEC. It might infer that, its spectacular growth in regional cooperation is a product of political and economic forces, and can be useful as a catalyst for tourism investment and increased visitor arrivals. Smith (1996) defines a tourism region as a 'contiguous area that has been explicitly delineated by a researcher, planner or public agency as having relevance for some aspect of tourism planning, development or analysis'. Now issue perhaps rise what is the best framework for the development of South Asian tourism mainly for the development of Bangladesh tourism industry.

The concept of the tourist international region is also increasingly apparent in place marketing where strategic alliances are formed to promote a set of countries, or parts of these, as a single destination (Hill and Shaw, 1995; Hollier, 1997; Seeking, 1987; Wing, 1989). Undoubtedly, creating image and infrastructure (last-mile connectivity -tourist spots and main highways) with other proper implication of the policies taken by the various regional groups like cross-region (BIMSTEC), region (SAARC) and sub-region (SASEC) can play a significant role to develop a preeminent framework for south Asian tourism industry, Bangladesh in particular.

4.8 Employment Issues: Recent Trends in Employment Levels

World Travel and Tourism Council estimates have covered employment levels in each major Asian and Pacific country on an annual basis since 1998, both for direct jobs in the sector (the "travel and tourism industry") and for direct and indirect jobs (the "travel and tourism economy").

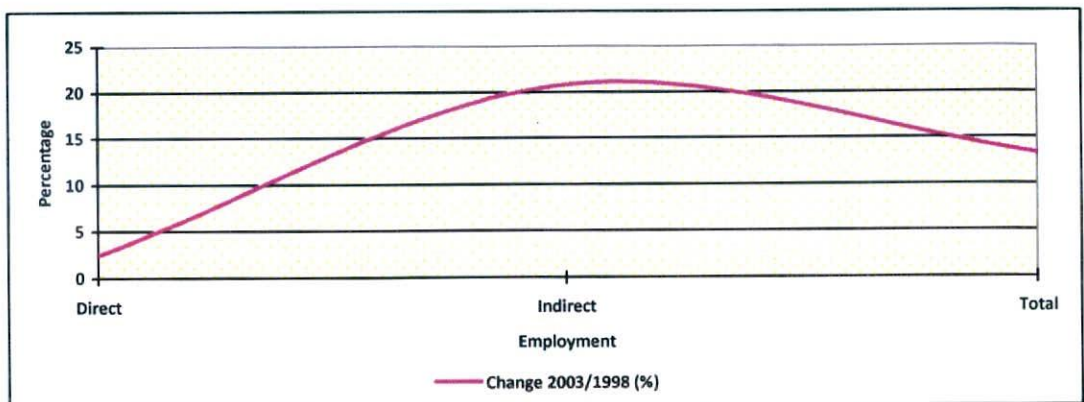
Figure 4.19: Employments in Travel and Tourism in Bangladesh during 1998 to 2003
(Thousands)



Source: Table 4.14 in the Annex.

In the year of 2003, 379 thousand people worked directly in Bangladesh particularly in this industry, and that an additional 1,252 thousand were indirectly employed, giving a total of 1,191 thousands dependent on the sector directly or indirectly. [Table: 4.14]

Figure 4.20: Employments in Travel and Tourism in Bangladesh, Percentage Change 1998/2003

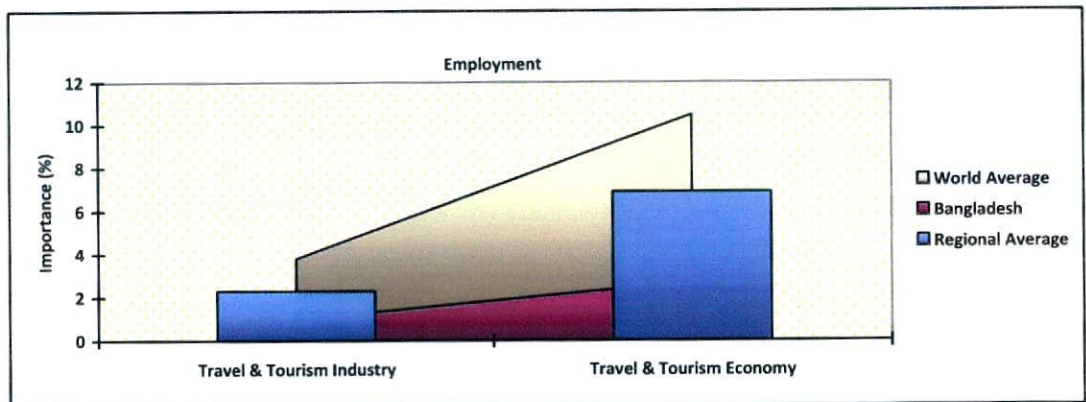


Source: Table 4.14 in the Annex.

The immediately noticeable discernable feature of Table 4.14 is that direct travel and tourism employment has declined since 2000, by over 2.9%. The 1997 financial crisis in

Asia left behind it a legacy of economic slowdown which hit employment levels hard. There may also have been improvements in labor productivity through an application of labor-saving technologies and work organization within this period. Also, as a comparison with indirect trends, the tourism industry in Bangladesh might be contracting more work out to suppliers, thereby diminishing direct employment but raising indirect employment, since the trends in total “travel and tourism economy” employment are different from those in the “travel and tourism industry”.

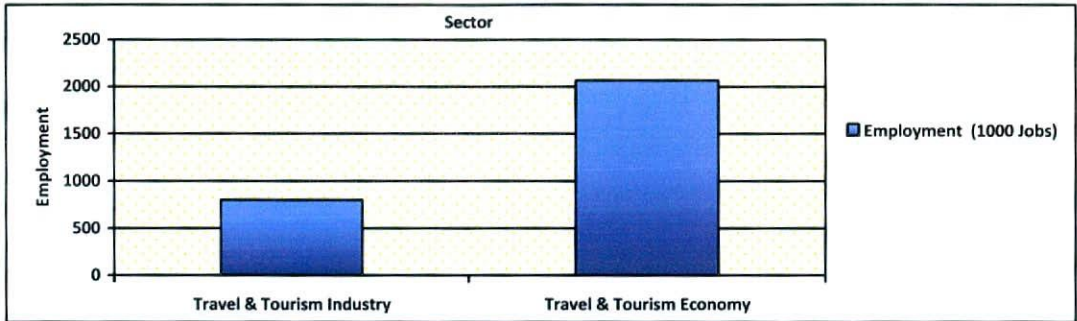
Figure 4.21: Importance of Travel and Tourism Jobs in Total Employment in Bangladesh, 2003 (%)



Source: Table 4.15 in the Annex.

The labor market in Bangladesh depends to some extent on tourism, with direct employment in the industry representing 1.0% of all jobs, and direct and indirect 2.7%. This is expected, given the ordinary status of the country, as a centre for leisure and travel. However, in 2003, direct employment in the region’s travel and tourism industry accounts for 2.3% of all employment, while direct and indirect jobs accounts for 6.9%. By global standards, these figures are insignificant. Worldwide in 2003, WTTC estimates that direct employment accounts for 2.8% of all jobs, and direct and indirect for 7.8%. [Table: 4.15]

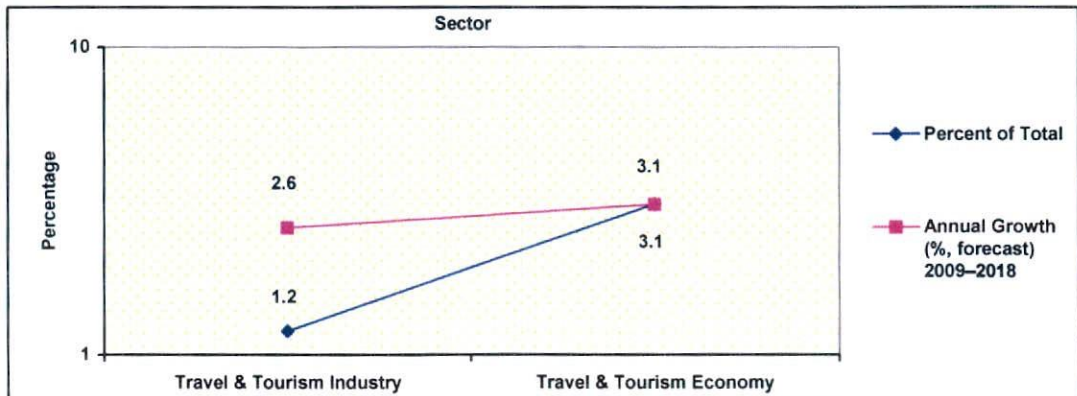
Figure 4.22: Importance of Travel and Tourism Jobs in Total Employment (1000 Jobs) in Bangladesh, 2008



Source: Table 4.16 in the Annex.

In 2008, World travel and Tourism Council estimates that employment in every 1,000 jobs in Bangladesh accounts for 801 for travel and tourism industry, and 2,065 for travel and tourism economy. [Table: 4.16]

Figure 4.23: Importance of Travel and Tourism Jobs in Total Employment (1000 Jobs) in Bangladesh (%), 2008



Source: Table 4.16 in the Annex.

According to this available data, the labor market in Bangladesh depends slightly on tourism, with direct employment in the industry representing 1.2% of all jobs, and direct and indirect i.e. travel and tourism economy 3.1%. The annual growth forecasted for

travel and tourism industry and travel and tourism economy during the year 2009-2018 are 2.6% and 3.1% respectively. [Table: 4.16]

4.9 National Tourism Organization

National Tourism Organization (NTO) in Bangladesh is primarily a tourism service provider and promoter of tourism product. In the year of 1972, the National Tourism Organization was established by the Presidential Order²⁷ of the Government of Bangladesh in the name of Bangladesh Parjatan Corporation (BPC) with the responsibility of development and promotion of tourism in Bangladesh. This is a semi-autonomous organization to construct, establish and operate hotels, restaurants, duty free shops (DFS), travel facilitation, tourism training institution, and the like. Later in 1973, it commenced dealing as a corporation in relation to contribute to the steady growth of national GDP with the objectives of (a) building up a positive image of the country abroad by introducing Bangladesh globally as a top tourist destination and develop its tourism prospects and facilities, (b) elevating infrastructure at tourist sites by establishing tourism infrastructures in Bangladesh, (c) providing services to tourists by creating tourism awareness among the people and establishing institutes for instruction and training of potential tourism personnel, and (d) flourishing resources that exist in Bangladesh by developing, expanding and promoting tourism business along with publishing tourism publications.

The BPC works as a support organization of the concerned Ministry in its policy formulation, implementation and promotional programs. It creates and operates significant programs by analyzing the environment sensitivity in the sustainable growth

²⁷ President's Order No, 143 of 1972 (The Bangladesh Parjatan Corporation Order, 1972), Ministry of Law and Parliamentary Affairs (Law Division), Government of the People's Republic of Bangladesh.

of tourism which includes: **(a)** conservation of tourist sites²⁸, **(b)** entry port to the country²⁹, **(c)** accommodation and foods³⁰, **(d)** cultural and amusement facilities³¹, and **(e)** public health and emergency health service³². As a promoter of the industry it is now engaged in creating facilities for local and foreign investors to develop the tourism sector by taking various activities like **(a)** capacity building, education and training through establishing an institute named National Hotel and Tourism Training Institute (NHTTI) in 1974, **(b)** awareness raising through arranging seminars, campaigns, dialogues and publications, **(c)** information dissemination from the Tourist Information Center (TIC) through giving advertisement in some reputed local and foreign televisions, newspapers and magazines covering publication of tourism related articles, producing video films, colorful brochures and folders, and participating in various international tourism fairs, **(d)** research and technologies through providing technical assistance to conduct various studies, and **(e)** cooperation through building relationships with different stakeholders.

Financial performance. The government of Bangladesh has kept 300 crore taka in the current Fifth Year Plan for private sector and 12 crore for public sector tourism development. NTO has been a self-financed profitable organization since 1983-84 financial years. The Table 4.13 shows the financial performance from 1990-1991 financial years:

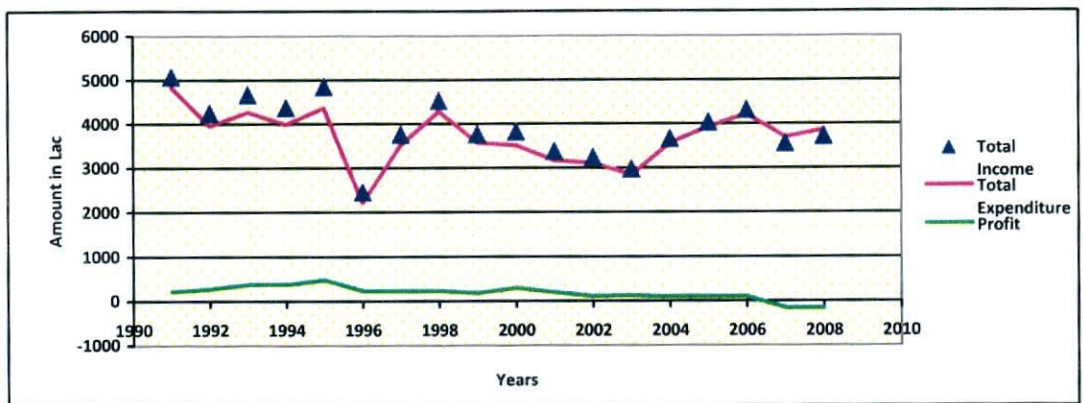
²⁸ archaeological, natural and cultural-traditional fairs, festivals and pilgrimage, and also to develop new events of interest to tourists.

²⁹ availability of international entry routes by air, road and sea, internal road and river communication and telecommunication facilities.

³⁰ building up of standard hotels and other types of accommodation at cities and tourist sites and making provision of hygienic food.

³¹ creation of facilities at sites and tourist spots so to enable tourist to pass their evenings in amusement.

³² overall development of country's public health facilities and general awareness among the people about healthy way of living, and development of a good network of health services so that tourist can get easy emergency health care at the time of need.

Figure: 4.24: Financial Performance of BPC

Source: Table 4.13 in the Annex.

BPC operates 24 Commercial Units at the main tourist spots of the country. Its tourist services include: **(a)** hospitality: Hotels/Motels–15, Restaurants–19, Duty Free Shops–6 and Picnic Spots–4, **(b)** tours– conducts both readymade and tailor-made package and sightseeing tours, besides organizing river cruises: educational tours for school students in and outside Dhaka, Dhaka city sightseeing tours, Mainamati tours, Nature and wildlife tours to Sundarbans, Beach tours to Cox's Bazar, archaeological tours to Mahasthangarh, Paharpur Buddhist Monastery and Rajshahi Varendra Research Museum river cruise to Chandpur and Jamdani village, Rupshi, **(c)** rent-a-Car: conducts both readymade and tailor-made package and sightseeing tours besides organizing river cruises, and **(d)** human resource development (HRD): Diploma in Hotel Management– 24 Months, Professional Chef Course– 12 Months, Travel Agency and Tour Operation– 18 Weeks, Food and Beverage Production– 18 Weeks, Food and Beverage Service– 18 Weeks, Front Office and Secretarial Operations– 18 Weeks, Bakery and Pastry Production– 18 Weeks, Housekeeping and Laundry– 18 Weeks, Computer Literacy Course– 12 Weeks

Human Resource Development. BPC has taken venture of human resource development for the industry. The BPC's National Hotel and Tourism Training Institute (NHTTI) founded in 1974 received technical and financial assistance from UNDP until 1996. The NHTTI also signed an MOU with the College of Tourism and Hotel Management of

Cyprus, an agreement with Dundee College, United Kingdom³³ and JICA/JOCV³⁴. The NHTTI has trained about 30,000 persons in different trades of tourism sector. BPC is currently endeavoring to upgrade the school and international accreditation is being sought. Apart from the public sector initiative, particularly the BPC, a number of universities and institutions are offering courses on tourism and hospitality to produce skill manpower that is the crying need of the tourism and hospitality industry. Dhaka University– the leading university of Bangladesh offering an internationally recognized four years Bachelor of Business Administration (BBA) and Master of Business Administration (MBA) degrees in tourism and hospitality management since 2008. Alongside, other few private universities are now also offering four-year course in tourism: a Bachelor of Science in Tourism and Hospitality Management. The Department of Environment provides training in ecotourism to its staff and other relevant personnel. Bangladesh, however, urgently needs to upgrade the hospitality sector by training trainers in tourism marketing, planning, and management. For ecotourism products, Bangladesh needs training in planning, site development, management, and conservation.

Promotion. As a part of marketing program BPC has made some documentary video films. These are projected through Bangladesh Missions and Biman Offices abroad. Moreover, BPC participates in major international tourism exhibitions in abroad³⁵.

BPC with its limited efforts, has been trying to nominate Cox's Bazar and the Sundarbans in the final list of New Seven Natural Wonders of the World and presently BPC is taking

³³ for training the teachers and upgrading of course curriculum of NHTTI with assistance of the British Council, Dhaka.

³⁴ for imparting Japanese language course for students and industry professionals.

³⁵ Single Country Trade Show in Bangladesh; International Travel Bourse (ITB) in Germany; Exhibition Sri Lanka; SATTE in India; Beijing International tourism expo in china; Out bound Travel Mart in India; Outbound Travel and Tourism Market (COTTM) in China; JATA in Japan; Arabian travel Market (ATM) in UAE; China International Travel Mart (CITM); East Mediterranean International Travel and Tourism (EMITT) and so on.

campaigning program to promote Sundarbans for retaining its position in the final list. Though Cox's Bazar could not come out successfully.

In effect, BPC is intended to commencing new programs aiming at **(a)** to discover new tourist attractions around the country, and **(b)** to develop and promote known and unknown tourist attractions to expand the tourism industry.

4.10 Tour Operators Association of Bangladesh (TOAB)

Tour operator operates its activities to boost tourism and make comprehensive logistic supports available for the travelers at a reasonable rate from one source as a reliable, responsible and efficient agent. All over the world tourists' expect a hazardless traveling, secured food and lodging, efficient spot-visits, economically cost effective in every step whether it is a business or a personal tour (Haider, 2007). With this intention tour operators of Bangladesh have seriously involved for the promotion of tourism in the country. Tour operating agencies of Bangladesh were basically managing tours inside the country in the early age and then started operating outbound (overseas) tours just to serve the local people. Afterward, many agencies offered inbound tours beside the domestic and outbound tours with enormous problems and difficulties in its operations. Since tourism sector of Bangladesh is an upcoming industry that the operating agencies along with the handful of expatriate and affluent Bangladeshi community of the society have been gradually realizing the importance of establishment of a formal trade body for contributing to the tourism development of the country.

Accordingly, in the year of 1992 Tour Operators Association of Bangladesh (TOAB) was formed with intend to develop and nourish tourism in Bangladesh and to promote tourism products of Bangladesh worldwide. The activities of TOAB have supposedly been managed most professionally by a group of qualified, trained and generous tourism trade personalities since its inception.

In 2002, the TOAB has been declared as an only government recognized trade body of professional tour operators³⁶ to meet the challenges of the twenty-first century by excelling in operating development program through ensuring and working for maintaining global standard service by its members towards the tourists both local and foreigners whether individual, group or corporate level. Now it is an organization of over 99 tour operators of Bangladesh that blends western efficiency and eastern hospitality with the expectation of having patronization and support of the government to take this industry far ahead making substantial contribution to the national economy³⁷.

Meanwhile TOAB initiated diverse programs for the development of tourism in Bangladesh including: **(a)** arranging meeting with concerned trade bodies like Aviation and Tourism Journalist Forum, **(b)** organizing seminars with Federation of Bangladesh Chamber of Commerce and Industries (FBCCI), Bangladesh Parjatan Corporation, **(c)** maintaining relationship with concerned government administrative and legislative authority like Ministry of Civil Aviation and Tourism, Bangladesh Parjatan Corporation etc., **(d)** affiliating with the major trade concern like Association of Travel agent of Bangladesh (ATAB), Bangladesh Hotel Owner's Association, Pacific Asia Travel Agent (PATA), Bangladesh Chapter and other trade bodies, **(e)** participating in different national international trade fairs like Bangladesh Travel and Tourism Mart (TTM)– Dhaka, Dhaka Travel Mart (DTM)– Dhaka, International Tourism Business (ITB)– Berlin, World Tourism Mart (WTM)– London, Beijing International Tourism Expo (BITE)– Beijing, ATA Travel Mart– Bangkok, Travel and Tourism Fair (TTF)– Kolkata, South Asian Tourism and Travel Exhibition (SATTE)– Delhi etc., and **(f)** organizing travel and tourism fair like Bangladesh Travel and Tourism Fair (BTTF)– Dhaka.

Finally, it is expected that, TOAB will do much more in the upcoming years with the change in the socio-economic and political environment in Bangladesh while it failed to

³⁶ after long wait and completion of different formalities, the association was finally recognized as a trade organization by the Ministry of Commerce, Government of the People's Republic of Bangladesh.

³⁷ creating large number of employment opportunities in particular.

carry out its full ability in the past years due to various limitations prevailing in the industry.

4.11 Association of Travel Agents of Bangladesh (ATAB)

Bangladesh being the country of about 160 million people is a huge market. Travel agents can take part by performing crucial tasks for the development of a tourism industry of the country. In fact, a travel agency usually projects a country positively in which it is working (Kaushik, 1997). To keep this importance in mind the Association of Travel Agents of Bangladesh has been working all over the country³⁸ as an association of over one thousand travel agents (Bari, 2007) with a purpose to bring discipline in the trade even though the travel trade in Bangladesh is going through a transitional period—from traditional to modernization system and concurrently from manual to automation system.

In 1976, the association was formed in the name of IATA (International Air Transport Association) Travel Agents Association with a precise directive and constitution based on the interests and welfares of the fellow members. Later in 1979, the association was renamed as the Association of Travel Agents of Bangladesh in short ATAB with the explicit aims at (a) to nourish the travel trade of this country, (b) to help the government to develop this travel trade to the expectation of the people of Bangladesh, (c) to promote, protect and safeguard the Interest of travel trade and tourism, (d) to foster the idea of cooperation and friendly relation among the travel agents and airlines, (e) to establish and maintain high ethical standard and quality development among those engaged in travel trade in the country, and (f) to communicate with the government machineries, airlines, Chamber of Commerce and Industries in Bangladesh and abroad to ensure the world class standard of travel trade and tourism (ATAB, 2004).

³⁸ there are about 1400 Travel Agents in Bangladesh based at Dhaka, Sylhet, Chittagong and Khulna, the major cities in the country.

Primarily there were two types of membership in the organization mainly general and associate³⁹ in nature. The members of the Association are licensed and controlled by the Registration Authority under the Ministry of Civil Aviation and Tourism, and the Travel agencies Registration and Control Ordinance 1977 respectively (Jabbar, 1986). In 2002 ATAB removed the disparity of the nature of membership and created regular membership with equal rights.

To ensure the airlines payment in time and discipline in the market ATAB accepts Billing and Settlement Plan (BSP)⁴⁰ of International Air transport Association (IATA) as a modern, scientific and technology oriented system in the travel trade in Bangladesh. The BSP is a system for computerized processing of accounts between agents and airlines on a country-by-country basis (Siddiqi, 2005) by which agents deal with all airlines through one central point– the BSP, rather than having to deal with each individual airline and providing the agents with a simplified approach to the selling, reporting and administration of passenger air transportation (Siddiqi, 2006). ATAB is operating a Joint Bank Guarantee with BSP for its members who can enjoy a facility of BDT 2 million Bank Guarantee with only deposit BDT 0.5 million with ATAB. They can enjoy a trading facility of BDT 2.5 million with this Bank Guarantee (ATAB, 2007).

ATAB has joined in global information technology⁴¹ which is a great leap forward of the Travel Agent's community in Bangladesh (Saleh, 2004) to maintain their quality of services keeping a pace with the world standard. In response to the need of trained staffs in the Travel Agencies, ATAB has been running a Training Institute⁴² since 2007 that offers Diploma and Certificate Courses⁴³ on Travel Trade and Tourism by highly qualified and experienced instructors including industry professionals. ATAB also

³⁹ the IATA and Biman approved agents were general members while others were associate members.

⁴⁰ is a system that was first introduced in Japan in 1971 and gradually it is accepted by almost all the country.

⁴¹ introduced website in the global network of travel and tourism world.

⁴² in the name and style of ATAB Training Institute.

⁴³ six months duration for diploma and 2 month duration for certificate courses.

organized marketing conference almost every year in abroad for the purpose of exchanging the views among the participants from different countries to promote bilateral tourism.

In order to help the government along with the members of the association ATAB undertakes diverse professional advancement projects. It has initiated a number of developments to upgrade its activities toward a positive direction through a realistic approach (Hossain and Naznin, 2006) to establish a very strong infrastructure for the betterment of the travel and tourism sector in the country. However, ATAB is struggling for discipline and transparency in travel trade in Bangladesh and consequently improving the image of the trade to the world class with excellence in all aspect of services by their real contribution.

4.12 Bangladesh Tourism Vision 2020

The World Tourism Organization forecasts the 'Tourism 2020' vision which is a long-term estimation for the development of worldwide tourism industry⁴⁴. In view of that, Bangladesh is also trying to attain vision 'Bangladesh Tourism 2020', the program developed by Bangladesh Parjatan Corporation (BPC)– the National Tourism Organization in 2004, aiming at utilizing the potential of tourism as a contributor to overall development of the country⁴⁵, including job creation, poverty reduction, accelerated national Gross Domestic Product (GDP), overall development and conservation of nature (Ali and Chowdhury, 2009). The corporation has estimated that some 0.9 million foreign tourists will visit Bangladesh in 2020, but the World Tourism Organization estimated that the figure would be 0.5 million. The estimation practically

⁴⁴ an essential outcome of this vision is quantitative forecasts covering a 25-year period, with 1995 as the base year.

⁴⁵ BPC has conducted a study on the condition of the tourism industry and formulated Tourism Vision 2020, which is based on the study report.

indicates that the average annual growth rate in tourist arrivals to Bangladesh would be much above the WTO estimates.

The Tourism Vision 2020 is expected to attain a number of possible outcomes : (a) exist and prevail positive image, (b) political stability, (c) turn into a single destination, (d) around 1.30 million tourist arrivals each year following the year 2020 and ongoing growth rate, (e) GDP contribution at least 4% -5% from the tourism industry, (f) well-built internal and external communication networks, (g) government and private sectors investment, (h) diversified products and improved marketing systems, and (i) liberate and easy inbound and outbound travel system (BPC, 2004).

According to Tourism Vision 2020, the corporation has taken up some plans and programs like development of tourism products, marketing, promotion and public relations and reformation of the NTO, etc. (Khaleda, 2005).

4.13 Country Branding

A brand is emotional, has a personality and captures the hearts and minds of its customers (Kotler and Pfoertsch, 2006) as well as has social value which speaks to the user (Kotler and Gertner, 2002) and facilitates the access to new markets by acting as ambassadors in global economy (Turley, 2004). Businesses with a strong brand positioning are benefiting from clarity of focus that provides them with more effectiveness, efficiency, and competitive advantage across operations (Vitale and Giglierano, 2002). So brand identity should help to establish a relationship between the brand and the customer by generating a value proposition involving functional, emotional, or self-expressive benefits (Aaker, 1996).

In many business industries, characterized by complex offerings that drive functional, symbolic, and experiential benefits, the brand represents the main relational resource

(Ambler, 1995; Fournier, 1998; Codeluppi, 2000) to create and to maintain a competitive advantage (Risitano, 2005). The brand with the decreased effectiveness of traditional marketing tactics and the emergence of new marketing tools (Keller, 2003) becomes one of the most important assets for the organization that intends to build and manage significant relationships with all business player presents in own value constellation (Normann and Ramirez, 1994), mainly with the final customer (Risitano, 2005) and it is also be relevant to the tourism industry.

Simon Anholt (1998) elaborated the concept of nation branding through his article "Nation Brands of the 21st Century" in the Journal of Brand Management where he pointed out that "brands create a value that is invisible" (Bhattacharya, 2007). Meanwhile, several studies (Word, 1998; Hall, 1999; Clarke, 2000; Sirgy and Su, 2000; Morgan et.al, 2002; Gnoth, 2002) emphasize either how perceptions of a destination are formed on the part of tourists or what factors affect formation of a destination image as well as identifying common attributes across a sample of destinations at national, regional and international levels. As a result, this view is also reflected in a number of conceptual models (Baloglu and McCleary 1999; Echtner and Ritchie, 1991; Gallarza et.al, 2002; Larsen and George, 2004; Hankinson, 2005). However, a branded city can thus attract tourists, much economic activities, and bring better quality of life to its residents (Taylor and Low, 2006).

Bangladesh has much to offer to a tourist. The country is centuries old and it has seen been many visitors over the years. It is only now starting to experience a commercial tourism boom (TBC, 2009). A country image is defined as the total of all descriptive, inferential and informational beliefs one has about a particular country (Martin and Eroglu, 1993). Bangladesh does not have the exact image. When tourists consider Bangladesh for traveling, perhaps they think of its poverty, flood and micro credit. It has become commonplace for the country to be associated with natural calamities, wavering political situation, corruption and other negative attributes to other parts of

the globe. However in many respects, the country renowned for warm hospitality is seemed as a land of opportunity and adventure and at this instant it is more significant to pay close attention by naming the country (brand name identification) for changing the image through some attractive slogan which will show the positive attribute or a promise as has been done by India: *Incredible India*, Singapore: *Uniquely Singapore*, Malaysia: *Truly Asia*, Dubai: *The Jewel in the Desert*, China: *The factory of the World*, Sri Lanka: *The Pearl of the Indian Ocean* and the like.

Country branding is relatively new concept. The concept of branding may be effectively utilized to address both the reality and perception challenges, which Bangladesh is currently confronting (Bhattacharya, 2007). It is therefore very important for countries to understand how publics around the world see them across key dimensions (Anholt, 2007). Eventually, the nation has been identified the necessity for branding the country to show the image of Bangladesh as a warm friendly destination waiting to welcome visitors from all over the world. To address the need of the time, the Bangladesh government has decided to launch country branding for Bangladesh, a logo and a theme have been developed by a special Country Branding Committee comprised of experienced and prominent personalities of the country (TNN, 2008) though the brand building initiative has to be a coherent approach driven by various sectors— the government, political parties, civil society, media, professionals, private sector, cultural world, workers and farmers, and urban and rural people, etc. (Rashid, 2009).

Bangladesh is a colorful country with a lot to offer. Thus it seems only right that the country should launch a bright brand of tourism (TBC, 2008). With that in mind in 2008 Bangladesh was given a name⁴⁶ (branding) as 'Rupomoy Bangladesh' (Beautiful

⁴⁶ on December 06, 2008 Saturday, the new Bangladesh Brand was formally launched at Pan Pacific Sonargoan Hotel in Bangladesh. The Chief Adviser of the then Caretaker Government of the People's Republic of Bangladesh was on hand to deliver the launch speech and reveal the slogan (Zaidi, 2008).

Bangladesh)⁴⁷ to establish and enhance a positive image in the world community, with object to declare that it is beautiful or more beautiful than other countries. Indeed, Bangladesh is a paradise just waiting to be discovered— for its panoramic landscapes, seascapes and breathtaking beauties of the nature.

4.14 Policies and Plans

Tourism policy developed and enacted by state agencies is the real basis for a state's role in tourism development and in correspondence promotion is just one aspect of policy even though it may well be the most visible and understood of a state's tourism development activities (Gartner, 2002). Tourism can significantly contribute to sustainable development particularly to alleviation of poverty and the protection and conservation of the natural, cultural and social environment. In view of that the international community has unanimously accepted this reality and thereupon established the World Tourism Organization⁴⁸ for providing administrative and institutional supports to tourism industry worldwide. Bangladesh is one of the founder-members of this organization besides, various international, regional and multinational organizations⁴⁹ that are giving different types of financial and technical assistance at an increasing rate for promotion and development of the tourism industry in Bangladesh (Tourism Policy, 1992). In fact, promotion of tourism in Bangladesh has started in 1972 under the aegis of the government by focusing the main attractions of the tourism industry of Bangladesh⁵⁰ and giving vigorous incentives for the last few decades. However, the tourism sector in many countries is not a priority sector and Governments often fail to extend investment incentives to tourism (UN, 2008).

⁴⁷ "A Rising Sun over a Blue Sea" has formed the Country's Logo, symbolizing the emergence of an independent Bangladesh with new promises and potentials.

⁴⁸ under the aegis of the United Nations Organization in 1975.

⁴⁹ such as UNDP, World Bank, IMF, UNESCO, EEC, ESCAP, ADB and so on.

⁵⁰ varied cultural heritages, ancient archaeological sites, Buddhist heritages and many eco-tourism sites, world's longest natural sea beach, etc.

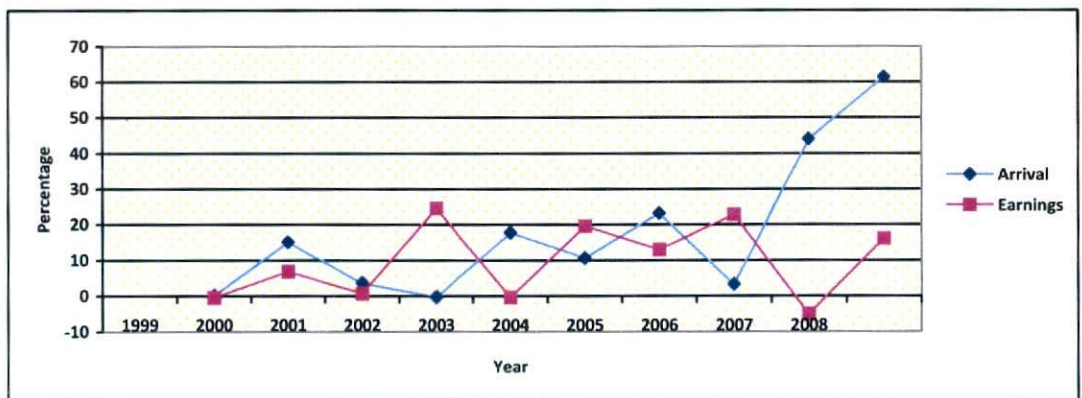
National Tourism Policy. Government has developed and enacted the National Tourism Policy in 1992 for the development of domestic and international tourism by recognizing tourism as a multidimensional industry with the main goals of: (a) increasing foreign exchange earnings by attracting foreign tourists, (b) increasing interest in tourism activities among the people and creating low-cost tourist facilities for them, (c) developing, preservation and maintenance of tourism resources of the country, (d) taking steps for alleviation of poverty by creating employment opportunities for greater number of people, (e) creating a favorable image of Bangladesh abroad, (f) opening up a recognized field of investment for private capital, (g) creating recreational facilities for foreign tourists and local people, and (h) developing the handicrafts and cottage industries, consolidation of national solidarity and consensus through fostering and development of the culture, heritage and traditions, of the country. It also underlines a tourism marketing policy and human resource development.

Concomitantly, planning and implementation strategies were suggested by the policy in conjunction with the status of tourism industry in Bangladesh and acknowledged the significance of having an effective coordination among various government ministries, departments, agencies and civil society bodies for the development of this industry like (a) national planning— Planning Commission, (b) capital investment— Finance Division and Banks, (c) arrangement of economic resources and technical assistance— Economic Relations Division, (d) physical infrastructural facilities development— Road and Road Transport Division, Railway Division, Ministry of Post and Telecommunications, Ministry of Energy and Mineral Resources, and Ministry of Works, (e) preservation of historical and archaeological monuments and sites, patronage to fine arts and crafts— Ministry of Cultural Affairs, (f) simplification of entry-exit regulations for foreigners— Ministry of Home Affairs, National Board of Revenue, and Bangladesh Bank, (g) development of the handicrafts industry— Ministry of Industries, (h) conservation of forests and wildlife— Ministry of Environment and Forest, (i) improvement of transfer arrangements for air passengers— Civil Aviation Authority, (j) external publicity and marketing— Bangladesh

Parjatan Corporation, Ministry of Information, Bangladesh Biman, Ministry of Foreign Affairs, and Export Promotion Bureau, and (k) traveling through waterways– Ministry of Shipping (Tourism Policy, 1992).

In 1999, recognizing the contribution of tourism to the socio-economic development of the country, *tourism was declared a thrust sector*. Keeping this in mind, tax exemptions and other benefits are given to the industry. While tourism has remained at low levels, *revenue from tourism has grown an average of 11.18% per annum since 1999, reaching BDT 6,124.5 million in 2008*. Growth in tourism arrivals averaged 14.14% growth per year during 1999 to 2008, but starting from a low base. [Table: 4.12]

Figure 4.25: Annual Growth of Tourist Arrivals and Tourism Earnings in Bangladesh during 1999 to 2008



Source: Table 4.12 in the Annex.

Meanwhile, two important committees⁵¹ were constituted by the government for achieving policy goals and pursuant to these committees one task force⁵² was formed for preparing a comprehensive plan for development of tourism industry in country.

⁵¹ one is the National Tourism Council (NTC) headed by the Honorable Prime Minister and other is the Advisory Committee of Tourism headed by the Minister in charge of Tourism.

⁵² with Chief of Army as Convener and Secretary of the Ministry of Civil Aviation and Tourism and Chairman of the Bangladesh Parjatan Corporation (BPC) as members.

The Task Force determined five objectives for sustainable development of tourism in Bangladesh encompasses: **(a)** development of regional tourism, which will exploit the social, cultural and traditional bondage of the people of neighboring countries, **(b)** development of international tourism, which will target tourist visiting neighboring countries to have transit in Bangladesh and golf players of Japan and Korea for participating in tournament in Bangladesh, **(c)** conservations of eco-system of coastal zone and islands of Bangladesh and simultaneously build up eco-tourism in the area based on the natural bio-diversity, **(d)** development of amusement and entertaining facilities in order to lengthen period of stay of tourists, and **(e)** involvement of the private sector actively in the overall tourism activity of the country (Johannesburg Summit 2002).

The National Tourism Policy undertook some initiatives for a vigorous promotion of tourism within and outside the country but most of those remained unimplemented. Against this backdrop and emergence of private sector tourism industry, it is urgently felt that the 1992 policy needs updating (Khan and Haque, 2007). Accordingly, a new policy for the tourism sector is drafted after series of discussions with the stakeholders along with a tourism law covering all aspects of the industry and is expected to come into force shortly after the national parliament approves.

National Industrial Policy. Giving priority to the industrialization alongside tourism, trade, and commerce to strengthen country's economical foundation, the Bangladesh government has developed and enacted the National Industrial Policy in 2005. For the development of its tourism, the policy has taken some commendable initiatives, including: **(a)** considering tourism as a service industry, **(b)** giving priority (21) as a thrust sector⁵³, and **(c)** offering various special incentives and financial facilities.

⁵³ those industries/industrial sub-sectors which have already been able to successfully contribute to the country's industrialization and poverty alleviation by increasing GDP, creating employment opportunities and increasing export income.

The Industrial Policy offered to local and foreign⁵⁴ investors which include: (a) tax exemptions, exemption from dual taxation (in case of foreign investors on the basis of bilateral agreements), tax holiday, and taxation at a reduced rate or accelerated depreciation (if the tax holiday and tax exemption facilities cannot be provided for new industries in the future), tax exemption on the interest of foreign loans, tax exemption on capital gains from the transfer of shares, exemption of income tax on salaries up to three years for the foreign technicians employed in the approved industries, (b) remittance up to 50% of the salary of the foreigners employed in Bangladesh and the facilities for repatriation of their savings and retirement benefits and personal assets at the time of their return, (c) facilities for repatriation of invested capital, profits and dividends, (d) guarantee against expropriation and nationalization of foreign private investment— as per Foreign Private Investment Promotion and Protection Act 1980, (e) Provision for transfer of shares held by foreigners to local partners with the permission from the Board of Investment and the Foreign Exchange Control Department of Bangladesh Bank, and (f) Reinvestment of reparable dividend is treated as new foreign investment.

However, entrepreneurs under the thrust sector might not receive these facilities automatically. The government would determine the facilities to be received by thrust sector entrepreneurs after analyzing and reviewing the performances and contributions of their sub-sectors/industrial enterprises to the national economy (National Industrial Policy 2005).

⁵⁴ which can be either in the form of joint ventures or on 100% ownership basis.

Promotion of tourism industry⁵⁵, directives for the development of human resource⁵⁶ in this sector and inclusion of Ministry of Civil Aviation and Tourism (MoCAT) in the National Committee for SME Development⁵⁷ has also been pointed out in the policy. Although, the National Industrial Policy carried out several programs for an active promotion of tourism in Bangladesh but it still asks for the close monitoring and immediate implementation of its activities by overcoming all its troubles.

The Tourism Master Plan. Since 1988, the Government of Bangladesh accepted and launched a Strategic Master Plan developed by the World Tourism Organization (WTO) in consultancy with MIS Pannel Kerr and Associates of the United Kingdom with UNDP funding for the development of tourism and this is being updated and revised by WTO (BPC, 2009).

The plan has identified a number of barriers of the tourism industry like **(a)** low level skill and education of the workforce, **(b)** insufficient and inadequate physical infrastructure, **(c)** lack of managerial, organizational and entrepreneurial skills in this sector **(d)** lack of private sector investment⁵⁸, and **(e)** problematic taxation⁵⁹ and high prices of alcohol which affects the growth of tourism and in contrast, recommended a number of overcoming approaches for the development of tourism in Bangladesh as well as it has discovered some reasons for unwillingness to involve in the tourism industry by private entrepreneurs like **(a)** the bureaucratic system⁶⁰, **(b)** difficulties in possessing

⁵⁵ through public-private partnership.

⁵⁶ by activating the tourism training institutes in the country.

⁵⁷ inclusion of the MoCAT would play a positive impact on growing up small and medium size enterprises in tourism sector of Bangladesh (Khan and Haque, 2007).

⁵⁸ partly resulting from uncertainty of the role of tourism within the national economic development and planning process

⁵⁹ tourists are affected greatly by the country's taxation policies whether concealed in ticket prices, value added taxes on local purchases, tour packages or overtly charged in additions to hotel and restaurant bills.

⁶⁰ involving the approval from several ministries or their agencies.

appropriate land at reasonable prices⁶¹, and (c) low rates of return on tourism investments particularly outside Dhaka⁶².

The plan has suggested (a) a short-term⁶³, medium-term⁶⁴ and long-term⁶⁵ planning strategy for the promotion of tourism in Bangladesh, (b) the governmental assistance to tourism⁶⁶, (c) building up as many as six tourism development zones⁶⁷, and (d) the role of National Tourism Organization (Bangladesh Parjatan Corporation)⁶⁸ as the main authority for tourism planning and the promotion of development.

Recommendations of the Master plan are now being taken into consideration for preparing and implementation of individual projects. In view of the time that has elapsed since adopting the Strategic Master plan, a review of Master Plan is under a way. A master plan would be undertaken for boosting the tourism sector and making it attractive by identifying immense potential for tourism in Bangladesh to attract local and foreign tourists (BSS, 2009).

Bangladesh Tourism Development Plan. In recent times, tourism development planning conforms to the national planning process (UN, 2008). As mentioned earlier, tourism as a thrust sector has been identified by the Industrial Policy of 1999 and afterward in 2005 through giving a little effort on sustainable income and employment generation by

⁶¹ lengthy, complicated and confusing land acquisition procedures causing delays in project processing.

⁶² commercial profitability is constrained by high taxes (customs duties on raw material imports, sales taxes in outputs and VAT on licensed premises) and small size of the market in general, but in particular outside Dhaka. Investment gestation periods are typically long in the tourism sector, and investors prefer the higher and more immediate returns available from trade and commercial activities.

⁶³ the short-term referred broadly to the third and fourth national development plans.

⁶⁴ the medium-term extending into the following five year period.

⁶⁵ major product (River Tourism Product, Village Tourism Development, Cultural Heritage, Forest and Wildlife and so on) initiatives will be required to achieve the growth targets.

⁶⁶ could be provided through a facilitation role and greater recognition of the potential importance of tourism.

⁶⁷ comprising of Dhaka, Cox's Bazar, Chittagong, Sundarban, Rajshahi, Sylet/Moulavi Bazar.

⁶⁸ the main authority for tourism planning and the promotion of development should be BPC.

tourism industry with the development of formal sector such as agriculture and industry. Before that, the National Tourism Policy of 1992 recognized the contribution of tourism to poverty alleviation. Historically, poverty in Bangladesh has been addressed through aids and reliefs, and recently through questionable micro-credit for generating employment and income in the informal sector activities. Despite that the development and growth of service sector– tourism is one of the services where Bangladesh has tremendous potentials, but remained largely unexplored, due to underlying importance of this sector.

In 2003, the government has declared Bangladesh Tourism Development Plan (Figure: 4.26) with priorities and the responsible institutions for the development of domestic and international tourism in the country which includes (a) development of Sundarbans as ecotourism product, (b) Sundarbans Biodiversity Conservation Project, (c) construction of a marine park and ecotourism development at St. Martin Island, (d) establishment of an eco-park at Sithakunda, Chittagong, and (e) development of Buddhist relics sites according to the master plan prepared in 1988 in which suggestions for the development of Buddhist relics sites were given.

Figure 4.26: Bangladesh Tourism Development Plan Priorities, 2003

Plans	Priorities	Responsible Institution
Development of Sundarbans as ecotourism product	Ecotourism	Ministry of Environment and Forest, Ministry of Civil Aviation and Tourism, and Bangladesh Parjatan Corporation
Sundarbans Biodiversity Conservation Project	Sustainability aspects of the Sundarbans and alternate income generation for the people surrounding the mangrove forest	Department of Environment

Source: Government of Bangladesh.

Figure 4.26: Bangladesh Tourism Development Plan Priorities, 2003 (Contd.)

Plans	Priorities	Responsible Institution
Construction of a Marine Park and Ecotourism Development at St. Martin Island	Sustainability of the Island	Ministry of Environment and Forest and Ministry of Defense
Establishment of an eco-park at Sithakunda, Chittagong	Plantation of trees and conservation of flora and fauna— an ecotourism project	Ministry of Environment and Forest
Integrated Coastal Zone Management Plan	Conservation and optimum uses of marine resources, enhancement of alternate livelihood, and poverty reduction and ecotourism	Ministry of Water Resources, Water Resources Planning Organization, Project Development Office-Integrated Coastal Zone Management Plan, and Ministry of Civil Aviation and Tourism
Development of Buddhist relics sites were given	Conservation of Buddhist relics and Buddhist circuit tourism	Ministry of Culture, Department of Archeology, and Ministry of Civil Aviation and Tourism

Source: Government of Bangladesh.

However, a “Special Development Plan for Cox’s Bazar Area” was prepared by an inter-ministerial committee in 1988-89 for the development of the tourism industry in the Cox’s Bazar area, but has not been implemented (CMP, 2006). Meanwhile the beaches of Cox’s Bazar and Kuakata along with the Sundarbans forest were established as Exclusive Tourist Zones (ETZ). Eleven eco-parks have also been established across the country. Ecotourism⁶⁹ has already been given high priority in the National Environmental Policy as well as in tourism policy and programs, realizing the global climate change of the globe in recent decade.

⁶⁹ a strategy for developing the ecotourism potential of the Sundarbans has recently been developed.

4.15 Challenges of Tourism Development in Bangladesh: Issues and Constraints

In reality, Bangladesh has an immense potential for the development of a sustainable tourism industry owing the significant and diverse natural, geographical, historical and cultural heritage assets. But considering the modest share in the world tourism market even in the regional markets and the concentration of tourism activity in the country, it seems that a large part of this inherent tourism potential remains unutilized. The desirable levels of tourism development in the country as a whole have not yet been achieved.

The inherent tourism attractions of the country cannot, by itself, make a successful tourism industry unless properly planned and managed. Despite the initiatives undertaken by government and the private sector to develop tourism, the country has been facing a number of constraints and problems in all aspects of tourism development as tourism in Bangladesh is supply-led rather than a market driven industry. It is already mentioned earlier, only a few studies were conducted and published in the recognized academic journals and other business periodicals and magazines focusing the challenges of tourism development in the country by raising a number of exciting issues and constraints exist in the industry. The challenges facing tourism and the development of a sustainable international tourism sector in the country is diverse as the country has its own tourism features, level of development and national development priorities and policies. Historically, a fundamental constraint on the tourism industry has been found the negligence shown by policy makers due to priority attention which has gone to other sectors and tourism largely has been ignored. Yet, in the case tourism development, these challenges can be summarized, inter alia, as follows:

Required technical knowledge and well-built promotional activity. Despite the fundamental awareness and basic cognizance of the economic importance of tourism as an industry and its positive impact as a potential source of foreign exchange earnings and employment, in many cases there is generally a lack of tourism knowledge and

professionals. In case of tourism in Bangladesh, this is often accompanied by the absence or weak publicity promotion and mass media exposure due, in many cases, to the limited communication systems and technological services.

Required tourism-related infrastructures. The sufficient infrastructures are necessary for the development of a sustainable tourism industry. Primary amongst these are hotels and lodging services, transportation and communication services, and tourism information services. This makes it difficult for Bangladesh to provide the international standards of facilities and services which tourists require.

Required tourism investment. While investment in services is well-established economic activity in the developed countries, it is still lagging behind in developing ones like Bangladesh. Investment in service-oriented projects, particularly in tourism, is often regarded in most developing countries as a high-risk task. Accordingly though they may have a natural tourism potential, it is still very difficult for Bangladesh to gain access to reasonable financing for their tourism projects even when they manage to tackle the problems of project identification and planning.

Required consistent tourism strategies and policies. In Bangladesh there are still difficulties in reaching integrated tourism policy-making due, in general, to policy conflicts between the government departments and the tourism private agencies. This is coupled in many cases with the lack of effective administration regulation and institutional frameworks of the tourism activity.

Required tourism diversification. Modern international tourism activity has shown a growing tendency towards diversification and change. This makes it also difficult for Bangladesh due to a relatively developed tourism sector, to keep pace with the rapidly changing and complex requirements of international tourists. In a highly competitive international tourism market, and considering the emergence of new tourism

destinations, improving the conditions that foster modern tourism development is not an easy process.

Required tourism safety. The safety of tourists is a primary factor for any successful tourism industry and should therefore be one of the basic objectives of tourism planning and management. Safety-related tourism problems, whether real or perceived exert a negative impact on the reputation of the host countries. In this regard, negative perceptions and political instability appear to play a detrimental role in the prospects of tourism in Bangladesh.

Furthermore, there are various reasons due to which tourism policy implementation has not occurred and these include:

Conservative religious society. Bangladesh is a Muslim country where Islamic traditions and practices are strictly adhered to and that establishes many social constraints on foreign tourists including the absence of entertainment contents such as alcohol, nightlife or the dressing in western clothes especially for women. Moreover, the strict codes of conducts are so rigid that even foreign Bangladeshi residing abroad found it difficult to travel within the country with ease and comfort due to these social pressures, lot of integrated tourism development and implementation cannot take place.

Inadequate promotional policy and media attention. The lack of promotional policies essential for promotion of Bangladesh as tourist destination through airlines, hotels, tour operators, and other intermediaries in foreign countries and lack of media attention showing that Bangladesh can be effectively showcased as country with tremendous tourism potential.

Public-private incorporation. The lack of integration between private and public sector that is a must for effective planning, coordination and implementation of tourist plans,

policies, and objectives in to action. Yet again, lack of awareness among general public as well as government agencies about the benefits and impact of tourism on Bangladesh.

Proper training and knowledge. Inadequate knowledge and training of tourism personnel such as tour operators, guides and tour planners due to a lack of training schools and university courses related to hospitality and tourism studies.

Inauspicious tourism safety and country image. Insecurity in the capital city and other regions of the country such as tribal areas are victimized by ethnic violence and kidnapping of innocent foreign and local travelers and professionals that ultimately creates a negatives image of the destination. General image of the country spoiled by few terrorist attacks tied with depressing feedback from local and western media.

Underdeveloped tourist sites. Underdeveloped tourist sites of the country and lack of proper tourist facilities, as well as proper development despite ample potential for touristic interest affect the tourists.

Funds and incentives. Lack of sufficient funds and incentives for the tourism sector and decline of Bangladeshi Taka (Currency) against dollar over the previous years also affect the tourists.

Conservative visa policy. The Bangladesh tourist visa policy⁷⁰ acts as an obstacle to tourism as many visa restrictions especially on neighboring countries as well as foreign tourists from other areas make travel to the country unappealing.

⁷⁰ in 2003 the issuing of visas upon arrival was halted, thus stopping many international tourists from visiting the country. Further, the visa processing at Bangladesh missions abroad is expensive and often not tourist-friendly. Strict border and airport immigration and customs formalities hamper the tourist industry.

Incompatible hotel standards and charges. Inconsistency in determining hotel standards and categories which enables a property to be classified according to services and facilities offered has resulted in an inadequate quality of accommodations and food outlets required to attract quality tourists from abroad. In contrast high rates on hotels and tourist resorts which discourage effective provision of high standard lodging facilities that are vital to attract tourists from Western and Middle Eastern countries.

4.16 Prospects of Tourism in Bangladesh

In conclusion, Bangladesh today is a country at the crossroads in global market. The country is moving towards the 21st century while still maintaining a link with the past. Bangladesh is a country whose sights and sounds will delight a visitor and keep the visitor returning again and again to this land of green mosaic.

The economic globalization of the world has boosted up the tourism trade and created an opportunity for the developing countries to develop the sector in order to reap benefit out of this ever-growing industry. Bangladesh is also working towards this goal. Bangladesh is relatively nascent in the world of tourism. The tourism industry in Bangladesh recorded increase in tourist arrivals. Arrivals surpassed the earlier peak figure in 2008. In term of foreign exchange Taka 6124.5 million was earned.

In the recent past, Bangladesh has developed some moderate tourist facilities in its tourism potential areas. Improvement in road communication has connected north to south and east to west cities without much trouble and hindrance. Railway, especially inter-city train service has considerable network to cover the major cities with the capital city. The inland waterway facilitates, easy and cheaper sources of transportation possess a great potential for tourism development.

Chapter Five

*Lessons for Bangladesh
from the Experiences of
the Selected Muslim
Countries*

5.1 Findings and Analysis: Lessons for Bangladesh

Major findings. A key element of a successful tourism industry is the ability to recognize and deal with change across a wide range of key factors and the way they interact (Dwyer et.al, 2009). This study basically dealt with the tourism experiences of Malaysia, Indonesia, Maldives, Azerbaijan, Turkey, Northern Cyprus, and Niger for the development of tourism in Bangladesh and found a range of key factors and the directions to interact among those factors that can help the concerned authorities in improving developmental policy for the tourism industry of Bangladesh. Some of the key factors taken into consideration from the studied Muslim countries that may help Bangladesh while considering the development of comprehensive programs for the tourism sector are cited below:

Malaysia

1. Identified tourism as a key sector for the country's future economic growth.
2. Malaysian government has focused more than ever on its tourism industry.
3. National Tourism Master Plan has been developed to manage, monitor, synchronize, and ensure all tourism development activities and programs.
4. Established a National Tourism Development Plan in consultation with the state, local governments, and the private sectors.
5. As its priority to tourism, the Malaysian Government has been increasingly generous with its budgets for marketing and promotions.
6. Contribution to regional development, it encourages the development of supporting sectors.
7. Declaration of "Visit Malaysia Year" (VMY) in the 1990's, 2000, and 2007.

8. Malaysia Fest and Shopping Carnivals, Malaysia Airlines, and Malaysian Association of Tour and Travel Agents (MATTA) have developed many attractive domestic holiday packages.
9. Measures have been taken to improve the skills in the action plan, like education and training at the forefront of tourism development, introducing it in the high-school curricula etc.
10. Malaysia approved the setting-up of the Islamic Tourism Centre (ITC).

Indonesia

1. Government of Indonesia gave its attention to this sector as Government is heavily involved in the tourism industry.
2. Tourism is being developed through covering tourism and tourism products with supporting programs.
3. Set a "Visit Indonesia Year 1990" program.
4. Marketing drive in 2004 was launched under the banner of 'The Most Varied Destination Anywhere'.
5. Marketing Indonesia as an international movie/film-making location.
6. Tourism is based on a long-term plan of development.
7. Development shows increasing efforts by the central government to work together with the local government.
8. Government has introduced regulations on environment which are related to the sector of tourism to protect serious degradation of the environment.
9. Government has put its best efforts in promoting people-centered tourism and ecologically friendly tourism.

10. Indonesia empowers small and medium scale entrepreneurs and cooperatives in tourism sector.
11. Government takes challenges to address human resources development along with infrastructure development and mastering the technology.

Maldives

1. Tourism is developed and managed according to country wide policy based on a master plan.
2. Tourism Act provides determination of zones and islands for the development of tourism.
3. Foreign investment is common in the Maldives tourism industry.
4. Promotion of ecotourism is practiced.
5. Workers in the tourism industry are represented by the Tourism Employees Association of Maldives (TEAM).

Azerbaijan

1. Several programs have been taken by Tourism Ministry for developing the professional education and training of human resources in tourism sector.
2. Arranged short-term, long-term, and intensive national courses along with overseas courses.
3. Arranged long-term cooperation agreement between the Ministry of Youth, Sport, and Tourism and relevant authorities in Turkey to provide appropriate training courses.
4. Advertisement spots on the leading national and international channels.

5. Participated in different international Tourism Exhibitions.
6. Government has Implemented state program for the development of tourism in the country during the period 2002-2005.
7. Alleviated the level of tourism services.
8. Development of public-private partnerships.
9. Government approved state program for the period of 2008-2016 on tourism development.
10. Developed investment projects for the growth of tourism.
11. Opened Tourist Information Centers (TIC).
12. Developing international cultural tourism routes.

Turkey

1. Government played a dominant role in the development of tourism.
2. Development of tourism has been allied with the general economic development of the country under various government policies.
3. Started a project to harmonize its tourism legislation.
4. Launched Tourism Vision of Turkey 2010.
5. Government has approved Turkey Tourism Strategy- 2023 for improvements in tourism.
6. Government has approved Activity Plan for Tourism Strategy of Turkey 2007-2013.
7. Emphasis was placed on airline and marine transportation, and communication.
8. Offered opportunities for the young people who are keen to work in tourism institutions.
9. Encouraged private entrepreneurship.

10. Enacted several important legislations for the creation of massive demand from domestic and foreign tourism investors.
11. Provided incentives to native and foreign investors for further tourism development.
12. Incorporated local communities into tourism planning and development.
13. Developed cooperation between public and private sectors.
14. Emphasis was placed on infrastructure development for considering as important steps in the development of Turkish tourism.
15. Local tourism related associations have been worked in the development of Turkish tourism.

Northern Cyprus

1. Government has developed comprehensive tourism plan.
2. Government has provided all necessary privileges and encouragements to potential investors.
3. Tourism industry was at the agenda of the economic targets.
4. Set policies for improving capacity to determine marketing targets.
5. Increased services quality in tourism industry.
6. Created a tourism development model which depends on small and middle scale managements.
7. Considered a tourism development model which will complement with other sectors in the economy, social and economic conditions of the country, and physical carrying capacities of the country.
8. Focused on investment and encouragement of tourism through the provision of a number of incentives.

9. Developed Tourism Master Plan and other important legal arrangements for tourism industry.
10. Formed policies for economic development plan to accelerate the tourism growth.
11. Offered casinos, disco, and night clubs. Tourists coming from Turkey who are not allowed to use casinos in their country.
12. Created tourism formations which go together with special enterprises, national government, local governments, and universities.
13. Major universities are offering graduation, post graduation, and some diploma and certificate courses to create skill forces for the industry.
14. Develop local tourism as well as external tourism.

Niger

1. Niger has promoted both domestic and international tourism simultaneously.
2. Government has given priority to the development of the local tourism industry.
3. Established collaboration with different ministerial departments.
4. Small tourism businesses played an important role in the development of travel and tourism.
5. Provided new facilities and renovated existing one.
6. Diversified tourism products and added more value to the South and Center East of the country.

Analysis. Tourism industry has been making a significant contribution to the socio-economic development of many countries in the Muslim world through its role in expanding their economic bases, increasing foreign exchange earnings, providing employment opportunities, and enhancing living standards. It is potentially very crucial for developing countries like Bangladesh, where the shortage of foreign exchange has generally been a strategic constraint in their development efforts and where there may be few alternative development opportunities available. However, the development experiences of the studied Muslim countries and the researchers' proclamation discussed throughout the study have been analyzed at this point carefully. The outcomes of this analysis are presented as paradigm using *general specification* (G_s), *pragmatic specification* (P_s), and *annotations* (**A**) that can help diminish inequalities in income and employment within countries, since areas suitable for tourism development are often situated far from the main centers of other economic activities. The following paradigms point out the lessons Bangladesh can take from the experiences of the studied Muslim countries:

Paradigm 1

G_s : Tourism is thought as a key sector for the country's economic growth.

P_s : Studied Muslim countries have identified tourism as a key sector for the country's future economic growth.

A: Government needs to give priority meaningfully as a thrust sector to develop the tourism industry in Bangladesh for the economic growth.

Paradigm 2

G_s : Government involvement in developing industries is prerequisite for the development of a country.

P_s : Government has focused more than ever on its tourism industry in recent time which is seen in the case of the Muslim countries under consideration.

A: The effective role of government can ensure an appropriate attention on tourism to flourish the tourism industry in the country.

Paradigm 3

G_S: Development of proper plan and policy plays vital role for sustainable development of an industry.

P_S: A revised tourism policy and national tourism master plan according to the need of the emergence economy have been developed to manage, monitor, synchronize and ensure all tourism development activities and programs in studied Muslim countries.

A : Government policy support and proper execution are needed for the development of tourism industry in Bangladesh.

Paradigm 4

G_S: Long term vision is required to develop and sustain an industry.

P_S: Studied Muslim countries have set long term vision and adopted strategic programs to reach the vision.

A : Despite economic, cultural, historical, and geographical potentials Bangladesh has, it is unfortunate that the country does not have much share in attracting tourists, part of which is caused by lack of massive vision toward the importance of tourism in economic development. Bangladesh needs to set long term vision for the sustainable development of the tourism industry.

Paradigm 5

G_S: Coordination with the state and private sector is required for the development of an industry.

P_S: In studied Muslim countries, establishment of tourism development plan in consultation with the state, local governments, private sector, and local community is extensively observed.

A : Bangladesh government should take increasing efforts to work together with different ministerial departments, local government, private sector, academicians, experts, and local community actively for the development of the tourism sector of Bangladesh.

Paradigm 6

G_S: A country needs such an industry which is multi-dimensional, opens doors for other sectors as well.

P_S: The tourism industry is an industry which is not an industry; it is more than an industry and links up other various sectors like telecommunication, garments, transport, F & B and so on. In the Muslim countries under consideration sophisticated link up has been observed clearly.

A : Bangladesh tourism can also open the doors for other concerned industries.

Paradigm 7

G_S: Effective and attractive marketing and promotions activities are necessary to flourish an industry.

P_S: As its priority to tourism, the Governments of studied Muslim countries have been increasingly generous with its budgets for marketing and promotions.

A : Bangladesh tourism industry requires more budgets for undertaking more marketing and promotional activities to attract tourists both from inside and outside Bangladesh.

Paradigm 8

G_S: Development of tourism industry includes the success of both inbound and outbound tourism.

P_S: Tourism industry of studied Muslim countries has developed both inbound and outbound tourism.

A : Bangladesh Parjatan Corporation (BPC), the National Tourism Organization and all concerned private organizations should boost up the marketing initiatives aiming at attracting the potential tourists— both local and foreign.

Paradigm 9

G_s: Professional education and training of human resources, infrastructure development and mastering the technology are essential in tourism sector.

P_s: Governments have taken challenges to address human resources development along with infrastructure development and mastering the technology in studied Muslim countries.

A : A number measures could be taken by government to improve the human resources employed in the tourism industry to increase the service quality like education and training at the forefront of tourism development, introducing it in the high-school curricula, arranging short-term, long-term and intensive national courses along with overseas courses.

Paradigm 10

G_s: Information center can reduce anxiety of tourist while planning tour.

P_s: Opened Tourist information centers, used Information and Communication Technology (ICT), foreign mission and many more have been observed in studied Muslim countries, for producing effective and efficient services for international tourists.

A : Bangladesh missions abroad, public and private offices abroad, and Internet can be used to inform foreign tourists about country's attractive places and facilities.

Paradigm 11

G_s: Development of tourism industry depends on availability and accessibility of information.

P_s: Studied Muslim countries already have established and taken initiatives to make the information available and accessible to the tourists.

A : Bangladesh requires producing tourism related information and making it available and disseminate to target market for increasing tourist arrivals.

Paradigm 12

G_S: Advertisement can play a vital task for dissemination of information about a destination.

P_S: Advertisement spots on the leading national and international channel which is observed in selected Muslim countries.

A : Bangladesh tourism industry should take initiatives to spot advertisement on the leading national and international channel on the subject of the tourism products and services offered in Bangladesh to attract local and foreign tourists.

Paradigm 13

G_S: The world wide tourist arrivals and foreign exchange earnings from tourism sector are growing day by day.

P_S: As a contribution to regional development, studied Muslim countries encourage the development of supporting sectors.

A : Bangladesh tourism has the immense opportunity that can help to connect with other supporting sectors (food, accommodation, transportation, shopping, etc.) effectively located in deferent places in the country, resulting in regional development of the country.

Paradigm 14

G_S: Every country wants to earn more foreign currency as quickl as possible.

P_S: Tourism industry of the Muslim countries under consideration generates foreign currency through the satisfaction of the tourists within a short possible time.

A : Bangladesh tourism industry can exploit this opportunity for the welfare of the country and thereby can earn huge foreign currency.

Paradigm 15

G_s: Employment opportunities are generated by the tourism industry.

P_s: Studied Muslim countries have generated further employment opportunities in the economy by providing diversified product and services to their tourists.

A : The development of Bangladesh tourism industry can generate both direct and indirect employment opportunities in relevant supportive sectors.

Paradigm 16

G_s: Small and medium scale businesses contribute to national development.

P_s: Studied Muslim countries empower small and medium scale entrepreneurs and cooperatives in tourism sector.

A : Bangladesh can take this opportunity to contribute in regional development.

Paradigm 17

G_s: International relationship can create bonding between countries which can increase tourist flows for the host country.

P_s: International cultural tourism routes have developed to improve its services for satisfying the tourists which is observed in studied Muslim countries.

A : Bangladesh needs to establish sound bilateral relationship with other countries especially with Islamic and neighboring countries for tourism development.

Paradigm 18

G_s: A country tries to make strong relationship with regional countries.

P_s: The tourism industry of studied Muslim countries has developed regional cooperation to ensure long-term sustainable tourism.

A : Bangladesh tourism can utilize this concept with countries like Malaysia, Maldives, India, Nepal, Bhutan, China, Myanmar, and Thailand etc.

Paradigm 19

- G_s:** Recognized foreign tourists' zone for the development of tourism especially for the conservative society.
- P_s:** Determination of zones and islands for the development of tourism is seen in the studied Muslim countries.
- A :** Bangladesh tourism industry needs to undertake more development programs which require determination of specific areas for foreign tourists to accelerate the international tourist arrivals.

Paradigm 20

- G_s:** Political stability is the prime desire of a country in this period.
- P_s:** Political stability is observed in the studied Muslim countries which contributed significantly in the tourism development of these countries.
- A :** Bangladesh should concentrate on the issue of political stability as quickly as possible for the development of tourism.

Paradigm 21

- G_s:** Every country is concerned about the environmental effect to its people and resources.
- P_s:** Government of studied Muslim countries has introduced regulations on environment which are related to the sector of tourism to protect serious degradation of the environment.
- A :** The endangered tourist spots and other resources of Bangladesh may be preserved with the sustainable development of tourism.

Paradigm 22

G_S: Foreign investments played a crucial role in developing an industry.

P_S: Studied Muslim countries have provided incentives to native and foreign investors for further tourism development.

A : Investment incentives for both the foreign and local investors must be provided to develop the tourism industry in Bangladesh.

Paradigm 23

G_S: Diversified tourism products add values.

P_S: Provided new facilities and renovated the existing one, have been observed in studied Muslim countries.

A : To satisfy the tourists in relatively a better way Bangladesh requires the diversification of tourism products and services.

Paradigm 24

G_S: Learning can create interest and enthusiasm among the people of the concerned community.

P_S: Studied Muslim countries have educated local people to deal with the tourists for giving standard services and ensuring their complete satisfaction.

A : Bangladesh needs to set learning program for the sustainable development of the tourism industry.

Paradigm 25

G_S: Stakeholders partnership is required for the development of an industry.

P_S: Studied Muslim countries have developed partnership among different stakeholders of tourism industry.

A : Bangladesh needs to set program for creating successful partnership in developing tourism industry.

Paradigm 26

G_s: Business bodies can create more tourist flow for the country.

P_s: Studied Muslim countries have shown willingness to cooperate with different business associations and have invited the private sector to invest in tourism sector.

A : In an attempt to provide the chance for other Muslim countries to become more familiar with Bangladeshi Islamic and cultural tourism attractions, various business bodies of Bangladesh like chambers clubs, associations, can arrange tours to visit Bangladesh in a continuous basis.

Paradigm 27

G_s: The flow of tourism between industrialized societies shows a higher rate compared to that of Islamic countries.

P_s: Studied Muslim countries have developed something that can partially be resolved by reinforcing common ground and identity of the Muslim world.

A : Bangladesh should concentrate on broad knowledge of each other's tourism attractions, proper communications and marketing systems in different layers, visa facilities provided to facilitate traveling, familiarity of the host and guest societies with each other's culture and language, availability of easy and low-cost air and land transportation facilities, and high quality services such as accommodations for increasing the rate of tourism flow.

Paradigm 28

G_s: Majority of European and western tourists who come to Muslim and eastern countries are seeking new and profound experiences; in some cases the religious values that are fast disappearing from some western countries.

P_s: Studied Muslim countries have focused their attention to the part of their tourism product that highlights their unique culture.

A : Bangladesh should also focus their attention to the part of its tourism product like archeology, cultural heritage, traditions, and diversity of nature to attract foreigners to the country.

Paradigm 29

- G_s:** Commonly pronounced tourism industry is constituted of 6 'S', viz. snow, sun, sands, sea, sex, and self-actualization and/or 3 'W', viz. wine, women, and wealth.
- P_s:** Studied Muslim countries have offered alcohol, nightlife, and gambling for foreign tourists to increase and retain tourist arrivals.
- A :** Bangladesh can exploit these experiences through blending its attractions in a differentiated manner and offering those to foreign tourists many of whom are interested to experience something different unlike most of the destination countries offer.

Paradigm 30

- G_s:** Attending exhibitions, highlighting the cultural aspects of tourism, and encouraging the investment in tourism programs are primary measures which can draw in tourists from all over the world.
- P_s:** Studied Muslim countries have vigorous program to attend international exhibitions for creating their market.
- A :** Bangladesh needs to set program for attending and arranging such exhibitions with the association of private sectors in developing successful tourism industry.

Paradigm 31

- G_s:** Tourism should be promoted at home so that the people can become aware of how to deal with an influx of tourists to their best economic and cultural advantage.
- P_s:** Studied Muslim countries have given priority to the development of the domestic tourism program.
- A :** Bangladesh should pay more attention to take lesson from the above experiences. It helps to take tourism on board as part of their life and ensure that it does not disturb the local way of life and culture.

Paradigm 32

- G₅:** Businesses with a strong brand positioning are benefiting from clarity of focus that provides them with more effectiveness, efficiency and competitive advantage across operations.
- P₅:** A branded city as well as country can attract tourists, much economic activities, and bring better quality of life to their residents which have been observed in studied Muslim countries.
- A :** Bangladesh should deal with the concept of branding to address both the reality and perception challenges effectively for establishing and enhancing a positive image in the world community.

In addition to above mentioned lessons acknowledged from the experiences of studied Muslim countries, the references of the Girne Summit 2009 on the Development of Tourism in Muslim Countries organized by TRNC with collaboration of OIC, IDB and others can create synergies with the national tourism program of Bangladesh as an OIC member state:

1. Joint ventures can be initiated by the government of Bangladesh with other OIC Member States in the tourism sector.
2. Government of Bangladesh can take initiatives by creating awareness regarding the importance of cultural tourism and to improve the image of Islam in the world with the help of the Islamic Educational, Scientific, and Cultural Organization (ISESCO), Research Centre for Islamic History, Art, and Culture (IRCICA), private sectors, international organizations, and concerned donor institutions.
3. Government of Bangladesh can organize executive training sessions in the field of tourism in collaboration with the relevant OIC institutions.

4. Government of Bangladesh can encourage the establishment of alliances between tour operators in the OIC Countries with a view to strengthening joint tourism marketing and promoting cooperation efforts at the subregions level as well as at the level of the OIC region as a whole.
5. Government of Bangladesh can diversify tourism products by the inclusion of sociocultural programs and traditional activities involving local communities along with ecotourism.
6. Government of Bangladesh can participate actively and massively in the tourism fair arranged by the Islamic Countries for acquiring knowledge regarding the development of tourism in the country.
7. Government of Bangladesh can establish and facilitate linkages in air, land/rail sea, and multimodal transportation with a view to facilitating access from one destination to another within the OIC region and from the rest of the World.
8. Government of Bangladesh can take necessary measures to facilitate the entry and movement of tourists among the OIC Member States and enhance intra-OIC tourism through, inter alia, simplifying administrative and legal travel procedures.
9. Government of Bangladesh can recognize and highlight the important role of the private sector in the promotion of tourism.
10. Private sector of Bangladesh can actively participate in the International Tourism Promotion Company established by the Islamic Chamber of Commerce and Industry (ICCI).
11. Government of Bangladesh can initiate the importance of exchange of experiences and expertise among OIC countries in the fields of restoration and preservation of Islamic cultural, heritage as well as in training of professional personnel for the tourism industry.

12. Government of Bangladesh can focus on the development of niche tourism.
13. Government of Bangladesh can exchange business delegations with the Turkish Cypriot as well as OIC member countries with a view to exploring the opportunities of economic cooperation considering investment, cultural relations, sports, and university education.

Almighty has blessed Bangladesh with bounties of nature. Tourists are always beauty, knowledge, fun, sun, and amusement hunters. Tourists visit those destinations where they are offered the opportunity of one or more of these hunting. In this context, Bangladesh has a bright prospect provided people can be informed in a structured way about its treasures. Bangladesh with her enriched natural beauty is unambiguously one of the most viable candidates for promoting tourism. Since the past few years, Government of Bangladesh has undertaken various measures to promote tourism but its' benefits has not attained the maximum. Bangladesh tourism never the less faces big challenges including the subjects of image, strategy, product development, education, cooperation, infrastructure, management, marketing and sustainable development.

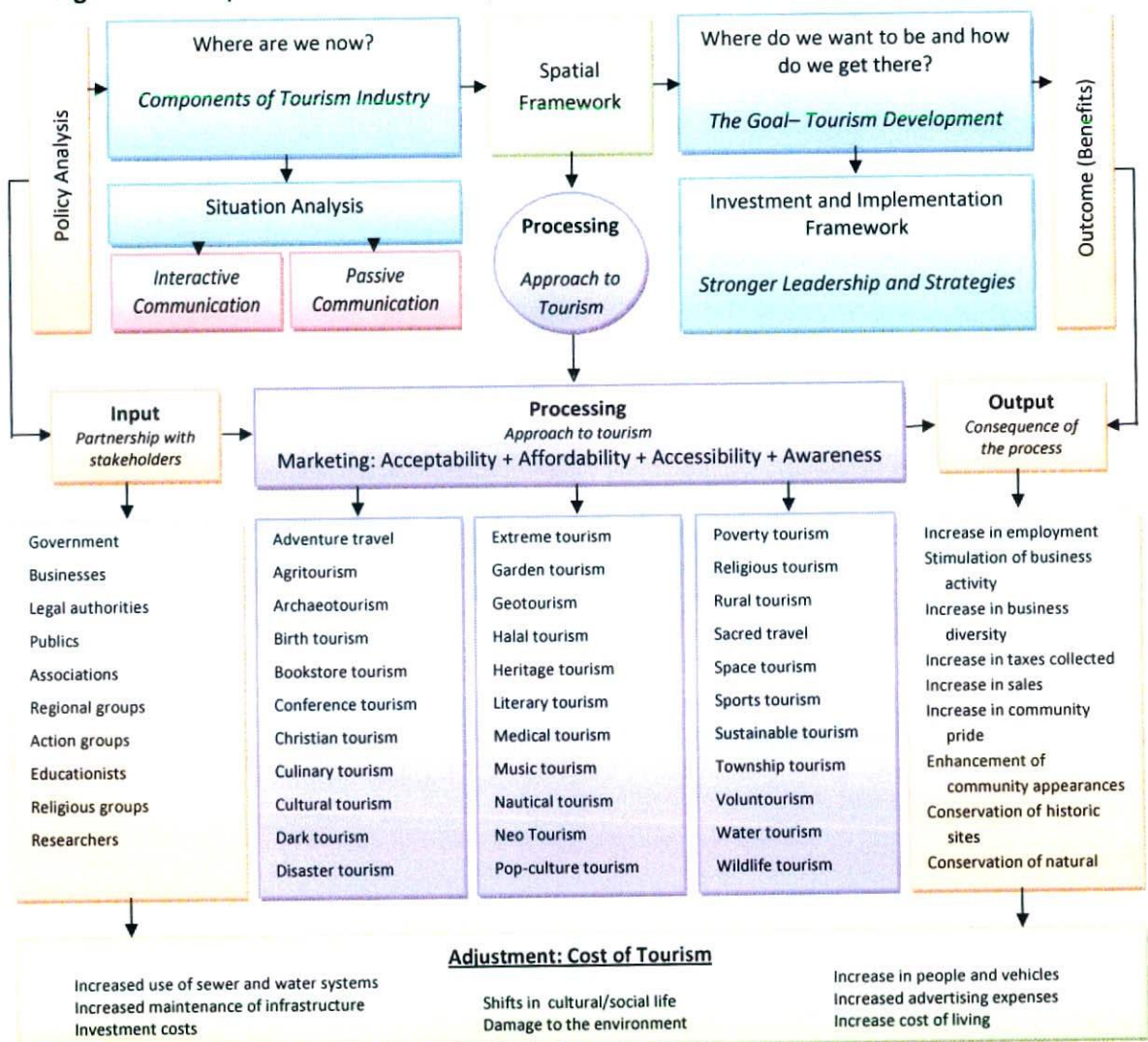
5.2 Model Development

To develop a planning model for Bangladesh tourism sector, the main focus, should be on a dynamic and continuous process with interrelated and interacting variables. The planning model should begin with the tour operator/tourist (client) and should also end with the client.

The aim of a systematic planning process should be to focus attention on the relevant strengths, weaknesses, threats and opportunities of the tourist sector. A mechanism should be developed, which can bring longer-term plans together with annual and tactical planning activity for compatibility purposes. This can help to develop a tourism

strategy which will be a unified, comprehensive and integrated plan. The degree of co-operation between the government and private sectors as regards the co-development of marketing strategies and tactics is an important and related issue in this regard. There may also be joint form of advertising campaigns and public relations exercises in major tourist-generating markets undertaken by NTO, private tour operators, and travel agents.

Figure 5.1: Proposed Tourism Development Process



Source: Contribution of the Researcher.

The prescribed model clearly identifies the types of tourism and tourists to be encouraged for the development of tourism in the country. In the beginning, policy planners must address three questions viz.: **(a)** where Bangladesh is now with respect to Bangladesh tourism industry— a complete stock taking of what it is selling to tourists and what it has for sales, **(b)** where Bangladesh wants to go in next couple of decades— where we want our tourism industry to go compared to other industries, and **(c)** how does Bangladesh get there— a comprehensive plan to be taken and implemented so that the industry can reach the height it is expected to go. Moreover, Bangladesh should set its objectives to be achieved by the tourism industry as well as “Do’s and “Don’ts.” Adjustments are needed in order to substantially decrease tourism's costs including facility operations and transport related greenhouse gas emissions, increased use of sewer and water systems, increased in people and vehicles, increased maintenance of infrastructure, shifts in cultural/social life, increased advertising expenses, investment costs, damage to the environment, and increase cost of living.

The Policy analysis provides a sketch of the principles, guidelines, and strategies contained in related documents at national, provincial and city level. As we know, Bangladesh tourism industry is still an infant one, government should take a policy of nursing the industry along with the initiative to build partnerships among the all stakeholders— government authorities, businesses, legal authorities, publics, associations, regional groups, action groups, educationists, religious groups, and researchers. Meanwhile, government has developed tourism strategies, but not all have been well integrated and supported by action.

The tourism spatial framework recognizes tourism development areas all over the country. Each area has a distinctive character in terms of **(a)** the types of tourism products and resources found there, **(b)** the types of tourist experiences presently offered, **(c)** the potential to develop new products, and **(d)** the characteristics of the population of the area. In addition to recognize the tourism development areas, the

tourism spatial framework also provides recommendations regarding the actions that can be taken in each tourism development area in order to: **(a)** increase the attractiveness of the area by developing unique products and experiences that build on the resources of the area, **(b)** make it easier for tourists to get to and move around the area, and **(c)** help local people to develop tourism businesses and share in the benefits of tourism. However, managing differentiation and offering diversified products with the traditional one can give Bangladesh a competitive edge. Few ways of offering diversified products instead of traditional tourism products are adventure travel, agritourism, archaeotourism, birth tourism, bookstore tourism, conference tourism, Christian tourism, culinary tourism, cultural tourism, dark tourism, disaster tourism, ecotourism, extreme tourism, festival tourism, garden tourism, geotourism, halal tourism, heritage tourism, literary tourism, medical tourism, music tourism, nautical tourism, neo tourism, pop-culture tourism, poverty tourism, religious tourism, rural tourism, tribal tourism, sacred travel, space tourism, sports tourism, sustainable tourism, township tourism, voluntourism, water tourism, and wildlife tourism.

Stronger leadership and strategies are needed in order to achieve the goals as public money is invested in tourism infrastructure development. The tourism community continues to face significant challenges in awareness building and education and actively working against green washing within the tourism industry.

Different focuses are required for both inbound and domestic tourism. For attracting foreign tourists to Bangladesh, discussion of problems with productive suggestions and solutions must be presented through media, and there must be an appropriate committee at government level for initiating discussion and drawing conclusion. Bangladesh tourism industry may attract growing number of tourists if the country can initiate and undertake proper marketing plan with the understanding of demarcation line between the tourists— domestic and international.

Chapter Six

Conclusion

6.1 Conclusion

Bangladesh is thought as a land of immense tourism potentials which can play a significant role for the economic development of the country. Unfortunately, the country has failed to exploit this opportunity due to the reluctance and low level involvement of concerned authorities both from public and private side considering the assignment of responsibility and development of infrastructure. In fact, the roles of concerned authorities for the development of tourism are not defined clearly so far and existing tourism infrastructures are not supportive for the acceleration of this industry.

The country can develop a very suitable form of tourism that is appropriate for a Muslim country. The present form of tourism development has not generated any significant developmental impacts. This may be accomplished through careful management practicing. The government can develop appropriate policies, legislations, and plans and instituted mechanisms to apply strict standards and regulations.

Private sector active in tourism holds great experience in developing the tourism industry and has potential power to establish links with private sectors in other countries for the exchange of tourists and other cooperation. Since many Bangladeshi tourism activists in the private sector have accumulated years of experience in this field, they may very well help boost tourism in the country and can take effective roles in the promotion of tourism as well. In general, all branches of tourism are interrelated, and therefore, anything done to develop one part of tourism may be applied to develop the other parts of the industry. Besides, religious tendencies which exist in Islamic countries can act as an underlying intention for the promotion of tourism.

Tourism should be promoted at home so that the people can become aware of how to deal with an influx of tourists to their best economic and cultural advantage. People should have the tendency to roam around the country to explore their own natural and

man-made treasures. If domestic tourism develops, the operating sector of the tourism industry (accommodation, travel trade, tourism services, transportation, entertainment, food service, adventure and outdoor recreation, attraction, and event sectors) develops and host people learn to work with a spirit of hospitality which is a precondition for tourism development. Bangladesh should pay more attention to get this lesson. It helps to take tourism on board as part of their life and ensure that it does not disturb the local way of life and culture.

6.2 Conclusive Pointers:

1. It is necessary that the state ensures an *appropriate investment climate* for businesses. A number of state interventions— in the form of provision of large-scale infrastructure projects, such as airports and transport networks, which precede and prepare the terrain for tourism development, as well as the *establishment of legal and regulatory frameworks* within which tourism can operate— are necessary. To attract investment, governments should deploy a range of investment incentives.
2. It is necessary that the government prepares a new tourism master plan *involving local experts* on tourism. All stakeholders within tourism should be educated.
3. To develop more *sustainable forms of tourism* all stakeholders within tourism should be educated. This includes staff training and raising awareness, through education and marketing, tourism responsibly of sustainability issues amongst host communities and tourists themselves.
4. It is important to arrange for *manpower development* catering to the need of the industry.
5. Tourism superstructures should be built in a *planned and comprehensive* manner.

6. Awareness and motivational programs should be undertaken regularly at different levels to increase the volume of domestic tourist flow. Travel related *fairs and festivals* should be arranged frequently in different parts of the country which will contribute to the awareness building.
7. As the government is planning to form a tourism board for giving the *appropriate guidance* to the industry it should be manned with the experts in this field, not based on chose and pick basis.
8. To orient *students who will lead the industry* in the days to come, basic Tourism courses should be included at the *secondary level* syllabus.
9. Government has recently gone for *country branding* titled "Beautiful Bangladesh" which the researcher does not consider appropriate. The branding slogan should be reframed taking help of the stakeholders which will develop a sense of participation among them. This in turn will contribute in getting synergistic drive enabling the industry to move to the desired direction. In first developing a brand, the objectives of the brand need to be carefully thought out. Brand must act as a cue to the product characteristics, including the product quality.
10. A large/required number of *Convention and Visitor Bureaus/Tourist Information Centers* should be set up in different places where tourists congregate.
11. Appropriate tourism products should be developed and targeted to the *right segments of tourists*. Prices should be set appropriately; if necessary, keeping in mind the ability of targeted tourists. Product development should be based on the visitors' expectations and capacity of a particular destination.

12. To help tourists to buy tourism products at ease, *tourism channel of distribution* should be extensive.
13. To make a significant contribution to the realization of sustainable tourism development' through resource conservation, by identifying *appropriate locations* for different activities and by encouraging developers to adopt appropriate approaches to development, a statutory land use planning system should be in place. Due to the popularity of coastal resorts, the integration of tourism considerations with those for water quality, for example, represents an important step towards achieving the *goals of sustainability*. In this light some exclusive zone may be developed for the tourists.
14. Villages, where there are some tourists' attraction, some beautiful huts may be constructed for the tourists by *private enterprises* where tourists may lodge. This can give complete indigenous flavor to the foreign tourists.
15. To exploit the hill region, well *transportation system* may be developed all around hill tracts where rope ways or toy trains could be made available.
16. Accommodation may be *arranged for tourists* in the houses of tribal people to give them clear understanding about tribal people and their life styles. If the industry is successfully integrated into the local economy with strong partnerships and backward economic linkages more people will benefit from tourism.
17. To view a life *picture of catching Hilsha in Padma* by tourists, arrangement of ships and boats may be made, always ready to voyage in the deep sea.
18. Frequent river *cruise in Padma, Meghna, Jamuna and Karnafuly* may be arranged with all desired facilities for the tourists.

19. For tourists to *move freely without the fear* of being hijacked, tight security all around the Sundarbans or in Hill Tracts areas may be arranged.
20. Personnel of Bangladesh missions abroad may be motivated to *inform foreign tourists* about country's attractive places and facilities. A separate department may be set up in each embassy that can work continuously to develop Bangladesh's image further and further to the foreigners.
21. An extremely good *communication system* like internet, digital phone, fax, etc. should be made available for the tourists in each of the tourist zones.

To boost the tourism industry, Bangladesh should undertake a comprehensive program of unlimited development. Many countries offer good examples in developing infrastructures for tourism. The planners should, however, pay attention to other countries' experiences and study their approach to ensure that investment is not wasted. Professional organizations and companies within the relevant field should be recruited to assist in effective development of tourism. However, any plan to boost a country's tourism must be structured on a sustainable development. The implication of the present study is that if government, related agencies, and peoples' mindset are broadened, then Bangladesh might emerge as one of the leading tourist destination countries in the globe.

Annex

Bibliography, Online Resources, and Tables

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Tables

Table 3.1: International Tourist Arrivals by Region (Millions).

Year	World	Africa	Americas	Asia and Pacific	Europe	Middle East
1950	25.3	0.5	7.5	0.2	16.8	0.2
1960	69.3	0.8	16.7	0.9	50.4	0.6
1965	112.9	1.4	23.2	2.1	83.7	2.4
1970	165.8	2.4	42.3	6.2	113.0	1.9
1975	222.3	4.7	50.0	10.2	153.9	3.5
1980	277.6	7.2	62.3	23.0	178.0	7.1
1981	278.2	8.1	62.5	24.9	175.1	7.6
1982	276.4	7.6	59.7	26.0	174.9	8.3
1983	281.2	8.2	59.9	26.6	179.0	7.5
1984	306.2	8.8	67.4	29.5	192.8	7.7
1985	319.5	9.6	65.1	32.9	203.8	8.1
1986	329.5	9.3	70.9	36.8	205.5	6.9
1987	359.0	9.8	76.6	42.1	223.3	7.2
1988	384.1	12.6	83.0	48.7	230.7	9.1
1989	409.0	13.8	86.9	49.4	249.6	9.2
1990	438.4	15.2	92.8	56.2	264.7	9.6
1991	441.3	16.3	95.3	58.0	262.8	8.9
1992	478.4	18.2	102.2	65.8	280.9	11.3
1993	494.2	18.8	102.2	72.3	289.5	11.4
1994	518.0	19.1	105.1	80.1	301.5	12.1
1995	538.5	20.1	109.0	82.5	313.2	13.7
1996	572.4	21.8	114.5	90.4	329.9	15.8
1997	596.0	22.8	116.2	89.7	350.6	16.7
1998	614.3	25.2	119.2	89.4	362.5	18.0
1999	637.4	26.7	122.0	98.8	368.4	21.5
2000	684.7	27.9	128.2	110.6	393.6	24.5
2001	684.4	28.8	122.2	115.8	393.1	24.5
2002	704.7	29.8	116.8	124.9	404.8	28.4
2003	692.2	31.4	113.3	113.2	404.9	29.5
2004	761.4	34.2	125.8	144.1	421.0	36.2
2005	801.6	37.3	133.2	155.4	437.4	38.4
2006	846	40.9	135.7	167.8	460.8	41
2007	898					
2008	916					

Source: World Tourism Organization (UNWTO) and Madrid (2009).

Table 3.2: International Tourism Receipts by Region (Billion US\$)

Year	World	Africa	Americas	Asia and Pacific	Europe	Middle East
1960	6.9	0.2	2.5	0.2	3.9	0.1
1965	11.6	0.3	3.4	0.5	7.2	0.3
1970	17.9	0.5	4.8	1.2	11.0	0.4
1975	40.7	1.3	10.2	2.5	25.9	0.9
1980	104.5	3.4	24.7	10.3	62.7	3.5
1981	106.0	3.7	27.8	12.1	58.1	4.4
1982	99.9	3.4	25.7	12.2	56.4	2.2
1983	103.0	3.5	26.3	12.8	56.0	4.4
1984	111.7	3.2	32.0	13.7	58.1	4.7
1985	118.5	3.1	33.3	14.5	63.4	4.2
1986	144.4	3.6	38.4	18.8	80.1	3.5
1987	178.1	4.6	43.1	24.8	101.1	4.5
1988	205.9	5.5	51.3	32.4	112.3	174.2
1989	262.9	5.7	60.2	36.1	155.8	5.2
1990	264.1	6.4	69.2	41.1	143.1	4.3
1991	277.7	6.0	76.3	42.9	148.1	4.5
1992	320.7	6.8	3.7	51.0	172.7	6.6
1993	327.3	6.9	89.41	57.0	167.3	6.9
1994	356.4	7.6	92.4	67.3	181.1	8.1
1995	405.0	8.5	98.4	75.9	212.3	9.8
1996	438.6	9.7	108.2	84.8	224.8	11.0
1997	442.0	9.5	114.4	82.2	223.7	12.1
1998	444.2	10.2	115.2	72.1	234.8	11.9
1999	457.4	10.8	119.9	79.0	233.9	13.9
2000	474.3	10.4	130.8	85.2	232.7	15.2
2001	462.5	11.5	119.8	88.0	227.7	15.6
2002	480.4	11.9	113.4	96.3	242.5	16.2
2003	527.5	16.0	114.1	93.5	284.1	19.7
2004	629.4	18.9	132.0	123.9	329.3	25.2
2005	676.1	21.6	144.5	134.5	349.2	26.3
2006	741.2	24.6	153.7	156	376.3	30.6
2007	856					
2008	944					

Source: World Tourism Organization (UNWTO) and Madrid (2009). Testing Times for International Tourism, July 2, Spain.

Table 3.3: Worldwide International Tourism (Annual % Change)

Year	Arrivals	Receipts
1990	7.19	0.46
1991	0.66	5.15
1992	8.41	15.48
1993	3.30	2.06
1994	4.82	8.89
1995	3.96	13.64
1996	6.30	8.30
1997	4.12	0.78
1998	3.07	0.50
1999	3.76	2.97
2000	7.42	3.69
2001	-0.04	-2.49
2002	2.97	3.87
2003	-1.77	9.80
2004	10.00	19.32
2005	5.28	7.42
2006	5.54	9.63
2007	6.15	15.49
2008	2.00	10.28

Source: Derived from Table 3.1 and Table 3.2.

Table 3.4: World Tourist Arrivals by Regions in Million during 2001 to 2007

Region	2001	2002	2003	2004	2005	2006	2007
Africa	28.8	29.8	31.4	34.2	37.3	40.9	44.2
Americas	122.2	116.8	113.3	125.8	133.2	135.7	142.1
Asia & Pacific	115.8	124.9	113.2	144.1	155.4	167.8	184.9
Europe	393.1	404.8	404.9	421	437.4	460.8	480.1
Middle East	24.5	28.4	29.5	36.2	38.4	41	46.4
World	684.4	704.7	692.3	761.3	801.7	846.2	897.7

Source: World Tourism Organization.

Table 3.5: Percentage (%) Changed in World Tourist Arrivals by Regions during 2001 to 2007

Region	02/01	03/02	04/03	05/04	06/05	07/06
Africa	3.5	5.4	8.9	9.1	9.7	8.1
Americas	-4.4	-3.0	11.0	5.9	1.9	4.7
Asia & Pacific	7.9	-9.4	27.3	7.8	8.0	10.2
Europe	3.0	0.02	4.0	3.9	5.3	4.2
Middle East	15.9	3.9	22.7	6.1	6.8	13.2
World	3.0	-1.8	10.0	5.3	5.6	6.1

Source: Derived from Table 3.4.

Table 3.6: Relative Shares of World Tourism Received by Region during 2001 to 2007

Region	2001	2002	2003	2004	2005	2006	2007	Average
Africa	4.2	4.2	4.5	4.5	4.7	4.8	4.9	4.6
Americas	17.9	16.6	16.4	16.5	16.6	16.0	15.8	16.5
Asia & Pacific	16.9	17.7	16.4	18.9	19.4	19.8	20.6	18.5
Europe	57.4	57.4	58.5	55.3	54.6	54.5	53.5	55.9
Middle East	3.6	4.0	4.3	4.8	4.8	4.8	5.2	4.5
Total	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.0

Source: World Tourism Organization.

Table 3.7: Table of International Arrivals Forecasts

Regions	Base Year (Million)	Forecasts (Million)		Market Share (%)		Average Annual Growth Rate (%)
	1995	2010	2020	1995	2020	1995-2020
Africa	20	47	77	3.6	5	5.5
Americas	110	190	282	19.3	18.1	3.8
Asia & Pacific	81	195	397	14.4	25.4	6.5
Europe	336	527	717	59.8	45.9	3.1
Middle East	14	36	69	2.2	4.4	6.7
South Asia	4	11	19	0.7	1.2	6.2
World	565	1006	1561	100	100	4.1

Source: UNWTO, Global Forecasts and Profiles of Market Segments (Madrid: World Tourism Organization, 2001), p.4.

Table 3.8: International Tourist Arrivals in OIC Countries (Thousands)

Country	1990	2000	2001	2002	2003	2004	2005	2006
Albania	30	32	34	36	41	32	48	60
Algeria	1137	866	901	988	1166	1234	1443	1638
Azerbaijan	93	681	767	834	1014	1349	1177	1194
Bahrain	1376	2420	2789	3167	2955	3514	3914	4519
Bangladesh	115	199	207	207	245	271	208	200
Benin	110	96	88	72	175	174	176	180
Brunei	377	984	840	790	685		815	836
Burkina Faso	74	126	128	150	163	222	245	264
Cameroon	89	277	221	226		190	176	
Chad	9	43	57	32	21	26	29	
Comoros	8	24	19	19	21	23	26	29
Djibouti	33	20	22	23	23	26	30	40
Egypt	2411	5116	4357	4906	5746	7795	8244	8646
Gabon	109	155	169	208	222			
Gambia	100	79	57	81	73	90	108	125
Guinea		33	38	43	44	45	45	46
Guyana	64	105	99	104	101	122	117	113
Indonesia	2178	5064	5153	5033	4467	5321	5002	4871
Iran	154	1342	1402	1585	1546	1659		
Jordan	572	1580	1672	2384	2353	2853	2987	3225
Kazakhstan		1471	1845	2832	2410	3073	3143	3468
Kuwait	15	78	73	96	94	91	104	178
Kyrgyz Republic		59	99	140	342	398	315	766
Lebanon		742	837	956	1016	1278	1140	1063
Libya	96	174	169	135	142	149		
Malaysia	7446	10222	12775	13292	0577	15703	16431	17547
Maldives	195	467	461	485	564	617	395	602
Mali	44	86	89	96	110	113	143	153
Morocco	4024	4278	4380	4453	4761	5477	5843	6558
Mozambique			323	541	441	470	578	664
Niger	21	50	52	39	55	57	60	60
Nigeria	190	813	850	887	924	962	1010	1111
Oman	149	571	647	643	630	908	989	1306
Pakistan	424	557	500	498	501	648	798	898
Palestine		310	43	33	37	56	88	123
Qatar	136	378	376	587	557	732	913	946
Saudi Arabia	2209	6585	6727	7511	7332	8599	8037	8620
Senegal	246	389	396	427	354	363	387	406

Table 3.8: International Tourist Arrivals in OIC Countries (Thousands) Contd.

Country	1990	2000	2001	2002	2003	2004	2005	2006
Sierra Leone	98	16	24	28	38	44	40	34
Sudan	33	38	50	52	52	61	246	328
Suriname	46	57	54	60	82	138	160	
Syria	562	1416	1801	2186	2085	3033	3368	4422
Togo	103	60	57	58	61	83	81	94
Tunisia	3204	5058	5387	5064	5114	5998	6378	6550
Turkey	4799	9586	10783	12790	13341	16826	20273	18916
Turkmenistan		3	5	11	8	15	12	
Uganda	69	193	205	254	305	512	468	539
UAE	973	3907	4134	5445	5871	6195	7126	
Uzbekistan	30	302	345	332	231	262	242	281
Yemen	52	73	76	98	155	274	336	382
OIC Total	34110	7293	72722	80917	9251	98081	103899	102013

Source: World Tourism Organization (UNWTO).

Table 3.9: International Tourism Receipts in OIC Countries (Million US\$)

Country	1990	2000	2001	2002	2003	2004	2005	2006
Algeria	105	102	100	111	112	178	184	215
Azerbaijan	228	63	43	51	58	65	78	117
Bahrain	135	573	630	740	720	864	920	1048
Bangladesh	11	50	48	57	57	67	70	80
Benin	55	77	85	93	106	118	103	
Brunei			155	114	124	181	191	224
Burkina Faso	11	19	20	35		40	45	
Cameroon	53	57	73	62	182	158		
Comoros	2	15	9	11	16	21	24	27
Cote d'Ivoire	51	49	53	51	69	82	83	84
Djibouti		8	9	9	7	7	7	9
Egypt	1100	4345	3800	3764	4584	6125	6851	7591
Gabon	3	20	15	18	15	10		
Gambia	26				56	47	56	66
Guinea	30	12	14	43	31	30		70
Guinea-Bissau			3	2	2	1	2	
Guyana	27	75	61	49	26	27	35	37
Indonesia	2105	4975	5277	5285	4037	4798	4522	4448
Iran	61	467	891	1357	1033	1044	1069	1194
Jordan	512	723	700	1048	1062	1330	1441	1642

Table 3.9: International Tourism Receipts in OIC Countries (Million US\$) Contd.

Country	1990	2000	2001	2002	2003	2004	2005	2006
Kazakhstan		356	452	622	564	718	701	838
Kuwait	132	98	106	117	118	178	165	205
Kyrgyz Republic		15	24	36	48	76	73	167
Lebanon				4284	6374	5411	5532	5015
Libya	6	75	78	181	205	218	250	190
Malaysia	1667	5011	6863	7118	5901	8203	8846	10427
Maldives	89	321	327	337	402	471	287	434
Mali	47	40	88	104	128	140	148	167
Morocco	1259	2039	2583	2646	3221	3922	4610	5984
Mozambique		74	64	63	98	95	130	140
Niger	17	23	30	20	27	31	43	35
Nigeria	25	101	91	139	30	21	18	21
Oman	69	221	385	393	385	414	401	538
Pakistan	156	81	88	97	122	179	182	255
Palestine		283	35	33	107	56	121	
Qatar		128	272	285	369	498	760	374
Saudi Arabia	1884	3312	3415	3418	5653	6486	5149	4955
Senegal	167	144	174	190	209	212	242	
Sierra Leone	19	10	14	38	60	58	64	23
Sudan	21	5	3	108	17	21	89	126
Suriname	1	16	14	3	4	17	45	95
Syria	320	1082	1150	970	773	1800	1944	2025
Tajikistan				2	2	1	2	2
Togo	58	8	11	13	15	19	20	10
Tunisia	948	1682	1751	1523	1583	1970	2143	2275
Turkey	3225	7636	10067	11901	13203	15888	18152	16853
Uganda	10	165	165	171	184	256	381	355
UAE	315	1063	1200	1332	1438	1593	3218	4972
Uzbekistan		27	22	22	24	28	28	43
Yemen	20	73	38	38	139	139	181	181
OIC Total	15164	36124	41980	49661	54222	65047	70460	74569

Source: World Tourism Organization (UNWTO).

Table 3.10: International Tourist Arrivals and Tourism Receipts in OIC Countries

Year	Tourist Arrivals (Million)	Annual change (%)	Tourist Receipts (Billion)	Annual change (%)
1990	34.1	7	15.2	9.1
2000	67.3	22	36.1	30
2001	72.7	8.1	42.0	16.2
2002	80.9	11.3	49.7	18.3
2003	79.3	-2.1	54.2	9.2
2004	98.1	23.8	65.0	20
2005	103.9	5.9	70.5	8.3
2006	102.0	1.8	74.6	5.8

Source: Derived from Table: 3.8 and Table: 3.9.

Table 3.11: International Tourism in Islamic (OIC) Countries during 1990 to 2006, Share in the World Market %

Year	Arrivals	Receipts
1990	7.8	5.7
2000	9.8	7.6
2001	10.6	9.1
2002	11.5	10.3
2003	11.4	10.3
2004	12.9	10.3
2005	13	10.4
2006	12.1	10.1

Source: World Tourism Organization (UNWTO).

Table 3.12: International Tourist Arrivals and Tourism Receipts in Malaysia

Years	Total Arrivals (Thousands)	Growth over Previous Year (%)	Total Earnings (Million US\$)	Growth over Previous Year (%)
1990	7446	–	1667	–
2000	10222	3.73	5011	20.06
2001	12775	24.98	6863	36.96
2002	13292	4.05	7118	3.72
2003	10577	-20.43	5901	-17.10
2004	15703	48.46	8203	39.01
2005	16431	4.64	8846	7.84
2006	17547	6.79	10427	17.87

Source: Derived from Table: 3.8 and Table: 3.9.

Table 3.13: International Tourist Arrivals and Tourism Receipts in Indonesia

Years	Total Arrivals (Thousands)	Growth over Previous Year (%)	Total Earnings (Million US\$)	Growth over Previous Year (%)
1990	2178	–	2105	–
2000	5064	13.25	4975	13.63
2001	5153	1.76	5277	6.07
2002	5033	-2.33	5285	0.15
2003	4467	-11.25	4037	-23.61
2004	5321	19.12	4798	18.85
2005	5002	-6.00	4522	-5.75
2006	4871	-2.62	4448	-1.64

Source: Derived from Table: 3.8 and Table: 3.9.

Table 3.14: International Tourist Arrivals and Tourism Receipts in Maldives

Years	Total Arrivals (Thousands)	Growth over Previous Year (%)	Total Earnings (Million US\$)	Growth over Previous Year (%)
1990	195	–	89	–
2000	467	13.95	321	26.07
2001	461	-1.28	327	1.87
2002	485	5.21	337	3.06
2003	564	16.29	402	19.29
2004	617	9.40	471	17.16
2005	395	-35.98	287	-39.07
2006	602	52.41	434	51.22

Source: Derived from Table: 3.8 and Table: 3.9.

Table 3.15: International Tourist Arrivals and Tourism Receipts in Azerbaijan

Years	Total Arrivals (Thousands)	Growth over Previous Year (%)	Total Earnings (Million US\$)	Growth over Previous Year (%)
1990	93	—	228	—
2000	681	63.23	63	-7.24
2001	767	12.63	43	-31.75
2002	834	8.74	51	18.60
2003	1014	21.58	58	13.73
2004	1349	33.04	65	12.07
2005	1177	-12.75	78	20.00
2006	1194	1.44	117	50.00

Source: Derived from Table: 3.8 and Table: 3.9.

Table 3.16: International Tourist Arrivals and Tourism Receipts in Turkey

Years	Total Arrivals (Thousands)	Growth over Previous Year (%)	Total Earnings (Million US\$)	Growth over Previous Year (%)
1990	4799	—	3225	—
2000	9586	9.97	7636	13.68
2001	10783	12.49	10067	31.84
2002	12790	18.61	11901	18.22
2003	13341	4.31	13203	10.94
2004	16826	26.12	15888	20.34
2005	20273	20.49	18152	14.25
2006	18916	-6.69	16853	-7.16

Source: Derived from Table: 3.8 and Table: 3.9.

Table 3.17: International Tourist Arrivals and Tourism Receipts in Northern Cyprus

Years	Total Arrivals (Thousands)	Growth over Previous Year (%)	Net Earnings (Million US\$)	Growth over Previous Year (%)
1990	300.81	—	224.8	—
2000	432.95	4.39	198.3	-1.18
2001	365.10	-15.67	93.7	-52.75
2002	425.56	16.56	114.1	21.77
2003	469.87	10.41	178.8	56.70
2004	599.04	27.49	288.3	61.24
2005	652.78	8.97	328.8	14.05
2006	715.75	9.65	303.2	-7.79

Source: Tourism Planning Office, State Planning Organization, TRNC. (Deputy Prime Ministry and Ministry of Foreign Affairs Public Relations Department)

Table 3.18: International Tourist Arrivals and Tourism Receipts in Niger

Years	Total Arrivals (Thousands)	Growth over Previous Year (%)	Net Earnings (Million US\$)	Growth over Previous Year (%)
1990	21	—	17	—
2000	50	13.81	23	3.53
2001	52	4.00	30	30.43
2002	39	-25.00	20	-33.33
2003	55	41.03	27	35.00
2004	57	3.64	31	14.81
2005	60	5.26	43	38.71
2006	60	0.00	35	-18.60

Source: Derived from Table: 3.8 and Table: 3.9.

Table 4.1: Tourist Arrivals by Ports (Mode)

Ports		Arrivals				
		2004	2005	2006	2007	Total
Air	Tourist	218,255	139,596	151,580	227,286	518,462
	%	(80.46%)	(67.22%)	(75.67%)	(78.62%)	(76.08%)
Land	Tourist	53,015	68,066	48,731	61,824	178,621
	%	(19.54%)	(32.78%)	(24.33%)	(21.38%)	(23.92%)
Total		271,170	207,662	200,311	289,110	697,083

Source: Special Branch, Bangladesh Police.

Table 4.2: International Tourist Arrivals and Tourism Receipts in Bangladesh

Years	Total Arrivals (In Numbers)	Growth over Previous Year (%)	Total Earnings (Million BDT)	Growth over Previous Year (%)
1991	113,242	—	331.50	—
1992	110,475	-2.44	329.10	-0.72
1993	126,785	14.76	594.40	80.61
1994	140,122	10.52	759.40	27.76
1995	156,231	11.50	955.20	25.78
1996	165,887	6.18	1401.20	46.69
1997	182,420	9.97	2741.40	95.65
1998	171,961	-5.73	2454.80	-10.45
1999	172,781	0.48	2451.90	-0.12
2000	199,211	15.30	2627.00	7.14
2001	207,199	4.01	2653.80	1.02
2002	207,246	0.02	3312.60	24.82
2003	244,509	17.98	3310.00	-0.08
2004	271,270	10.94	3967.56	19.87
2005	207,662	-23.45	4493.89	13.27
2006	200,311	-3.54	5530.65	23.07
2007	289,110	44.33	5265.19	-4.80
2008*	467,332	61.65	6124.50	16.32

Source: Derived from Table: 4.17 and 4.18. [* The Ministry of Tourism and Civil Aviation sources and *The Daily Independence (Internet Edition), Dhaka, Tuesday 7 July 2009.]

Table 4.3: Inbound Tourism in Bangladesh: Top Ten Originating Countries during 2001 to 2007

Country	2001			2002			2003			2004			2005			2006			2007		
		Rank	%		Rank	%		Rank	%		Rank	%		Rank	%		Rank	%		Rank	%
India	78090	1	37.69	80415	1	38.80	84704	1	34.63	80469	1	29.66	86232	1	41.53	60516	1	30.21	78568	1	27.18
UK	34087	2	16.45	28905	2	13.95	42138	2	17.23	52410	2	19.32	24955	2	12.02	37136	2	18.54	51314	2	17.75
USA	13394	3	6.46	13622	3	6.57	24458	3	10.00	27895	3	10.28	13422	3	6.46	19604	3	9.79	34638	3	11.98
Pakistan	7010	5	3.38	8703	4	4.20	9238	4	3.78	11997	4	4.42	5671	6	2.73	6680	5	3.33	12224	4	4.23
China	6867	7	3.31	6681	6	3.22	7021	6	2.87	9238	5	3.41	6982	4	3.36	6955	4	3.47	11825	5	4.09
Canada	5484	8	2.65				5847	8	2.39	8964	6	3.30	4519	8	2.18	5085	6	2.54	10573	6	3.66
Australia										6815	8	2.51	3686	9	1.77	4878	7	2.44	7902	7	2.73
Malaysia	3204	10	1.55	3706	10	1.79													6408	8	2.22
Thailand				3997	9	1.93	4188	9	1.71							3469	10	1.73			
Germany							4184	10	1.71	4812	10	1.77									
Korea	6896	6	3.33	6511	7	3.14	7465	5	3.05	6575	9	2.42	5332	7	2.57	4133	9	2.06	6020	9	2.08
Japan	7090	4	3.42	7325	5	3.53	6523	7	2.67	7857	7	2.90	6269	5	3.02	4370	8	2.18	5851	10	2.02
Nepal	4280	9	2.07	4159	8	2.01							3378	10	1.63						
Others	40797		19.69	43222		20.86	48743		19.93	54238		19.99	47216		22.74	47485		23.71	63787		22.06
Total	207199		100	207246		100	244564		100	271270		100	207662		100	200311		100	289110		100

Source: Source: Derived from Table: 4.17.

Table 4.4: Inbound Tourism by Purpose during 2005 to 2007

Purpose	2005		2006		2007	
	Number	%	Number	%	Number	%
Tourism	68077	32.78	84831	42.35	141510	48.95
Business	92126	44.36	78572	39.23	113759	39.35
Religion	6606	3.18	6632	3.31	9513	3.29
Education	5947	2.86	9624	4.80	13813	4.78
Official Job	4456	2.15	3112	1.55	5249	1.82
Others	30450	14.66	17540	8.76	5266	1.82
Total	207662	100	200311	100	289110	100

Source: Special Branch, Bangladesh Police.

Table 4.5: Outbound Tourism in Bangladesh: Top Ten Destination Countries during 2005 to 2007

Country	2005			2006			2007		
	Number	Rank	%	Number	Rank	%	Number	Rank	%
India	1396378	1	79.05	1499626	1	82.44	1987531	1	85.41
UK	83110	2	4.70	78538	2	4.32	59509	2	2.56
USA	34934	5	1.98	40364	3	2.22	39661	3	1.70
Oman	14677	7	0.83	9688	8	0.53	27911	4	1.20
UAE	64451	3	3.65	12162	6	0.67	26637	5	1.14
S/Arabia	37356	4	2.11	16789	4	0.92	17168	6	0.74
China	12349	8	0.70	12403	5	0.68	13929	7	
Pakistan							13188	8	
Thailand	15040	6	0.85	10734	7	0.59	11708	9	0.50
Japan							11130	10	
Kuwait	10518	9	0.60	5372	10	0.30			
Canada	8327	10	0.47	9468	9	0.52			
Nepal			0.00						
Others	89406		5.06	123861	5.06	6.81	118637		5.10
Total	1766546		100	1819005		100	2327009		98.4

Source: Derived from Table: 4.17.

Table 4.6: Outbound Tourism by Purpose during 2005 to 2007

Purpose	2005		2006		2007	
	Number	%	Number	%	Number	%
Tourism	309678	17.53	419579	23.07	883850	37.98
Business	157070	8.89	258771	14.23	622067	26.73
Religion	48647	2.75	59474	3.27	79538	3.42
Education	43605	2.47	39903	2.19	56744	2.44
Official	8324	0.47	8219	0.45	9262	0.40
Job/Service	1155616	65.42	1001655	55.07	653437	28.08
Others	43606	2.47	31404	1.73	22111	0.95
Total	1766546	100	1819005	100	2327009	100

Source: Special Branch, Bangladesh Police.

Table 4.7: Inbound and Outbound Tourism of Bangladesh

Year	Total Inbound	Total Outbound	Excess outbound over inbound	Tourism Inbound	Tourism Outbound	Excess outbound over inbound
2001	207,199	1,075,399	868,200			
2002	207,246	1,157,940	950,694			
2003	244,509	1,413,648	1,169,139			
2004	271,270	1,564,755	1,293,485	39,840	192,862	153,022
2005	207,662	1,766,546	1,558,884	68,077	309,678	241,601
2006	200,311	1,819,005	1,618,694	84,831	419,579	334,748
2007	289,110	2,327,009	2,037,899	141,510	883,850	742,340
Total	1,627,307	11,124,302	9,496,995	294,418	1,613,107	1,318,689

Source: Special Branch, Bangladesh Police.

Table 4.8: Tourists' Arrivals and Receipts in Bangladesh from SAARC Region during 1996 to 2007

Country	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Bhutan	568	959	441	730	1010	1263	1241	1228	847	1187	1422	1600
India	53007	61606	57937	62935	74268	78090	80415	84704	80469	86232	60516	78568
Maldives	97	123	63	53	189	129	150	182	98	220	693	1321
Nepal	3628	5296	4799	4733	4481	4280	4159	3904	3144	3378	3422	4537
Pakistan	7070	11481	12087	7894	10637	7010	8703	9238	11997	5671	6680	12224
Sri Lanka	1522	1686	1653	1839	2427	3026	2524	2831	2826	2322	2410	3799
Total Arrivals	65892	81151	76980	78184	93012	93798	97192	102087	99381	99010	75143	102049
Growth	–	23.16	–5.14	1.56	18.97	0.85	3.62	5.04	–2.65	–0.37	–24.11	35.81
Tourism Receipts (million)	954.69	1175.77	1115.34	1132.78	1347.62	1359.01	1408.19	1479.12	1439.90	1434.53	1578.83	–
Growth	–	23.16	–5.14	1.56	18.97	0.85	3.62	5.04	–2.65	–0.37	10.06	–

Source: Statistical Report, Resource Center, BPC.

Table 4.9: Tourist Arrivals over Departure of Bangladesh in SAARC Region during 1996 to 2006

Country	Total Arrivals	Average Arrival	Average Departure	Excess Arrival over Departure
Bhutan	12496	1021.27	123	898.27
India	858747	80359.91	542354	-461994
Maldives	3318	145.82	34	111.82
Nepal	49761	4822.36	1314	3508.36
Pakistan	110692	10336.55	3567	6769.55
Sri Lanka	28865	2490.363	1095	1395.36
Total	1063879	99176.27	548487	-449311

Source: Derived from Table: 4.17.

Table 4.10: Tourists' Arrivals in Bangladesh from BIMSTEC Region during 1996 to 2006

Nationality	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Bhutan	568	959	441	730	1010	1263	1241	1228	847	1187	1422	1600
India	53007	61606	57937	62935	74268	78090	80415	84704	80469	86232	60516	78568
Myanmar	545	322	372	332	308	353	358	437	649	541	1074	3626
Nepal	3628	5296	4799	4733	4481	4280	4159	3904	3144	3378	3422	4537
Sri Lanka	1522	1686	1653	1839	2427	3026	2524	2831	2826	2322	2410	3799
Thailand	1522	1645	3215	2159	2492	2881	3997	4188	3376	2955	3469	3484
Total	60792	71514	68417	72728	84986	89893	92694	97292	91311	96615	72313	95614
% Change		17.64	-4.33	6.30	16.85	5.77	3.12	4.96	-6.15	5.81	-25.15	32.22

Source: Derived from Table: 4.17.

Table 4.11: Tourists' Arrivals in Bangladesh from SASEC Region during 1996 to 2006

Nationality	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Bhutan	568	959	441	730	1010	1263	1241	1228	847	1187	1422	1600
India	53007	61606	57937	62935	74268	78090	80415	84704	80469	86232	60516	78568
Nepal	3628	5296	4799	4733	4481	4280	4159	3904	3144	3378	3422	4537
Sri Lanka	1522	1686	1653	1839	2427	3026	2524	2831	2826	2322	2410	3799
Total	58725	69547	64830	70237	82186	86659	88339	92667	87286	93119	67770	88504
% Change	-	18.43	-6.78	8.34	17.01	5.44	1.94	4.90	-5.81	6.68	-27.22	30.59

Source: Derived from Table: 4.17.

Table 4.12: Annual Growth of Tourist Arrivals and Tourism Earnings in Bangladesh during 1999 to 2008

Year	Arrival Growth over Previous Year (%)	Earnings Growth over Previous Year (%)
1999	0.48	-0.12
2000	15.3	7.14
2001	4.01	1.02
2002	0.02	24.82
2003	17.98	-0.08
2004	10.94	19.87
2005	-23.45	13.27
2006	-3.54	23.07
2007	44.33	-4.80
2008	61.65	16.32
Average Annual Growth 08/99	14.14	11.18

Source: Derived from Table: 4.2 in the Annex.

Table: 4.13: Financial Performance of BPC

Year	Total Income	Total Expenditure	Taka in Lac Pretax Profit/Loss
1990-1991	5079.70	4852.92	226.78
1991-1992	4254.31	3970.49	283.82
1992-1993	4673.83	4289.36	384.47
1993-1994	4385.17	4005.01	380.16
1994-1995	4859.37	4378.21	481.16
1995-1996	2455.51	2218.84	236.67
1996-1997	3768.76	3538.49	230.27
1997-1998	4541.87	4304.26	237.61
1998-1999	3776.49	3592.59	183.90
1999-2000	3829.00	3528.97	300.03
2000-2001	3388.26	3187.14	201.12
2001-2002	3248.26	3129.32	118.94
2002-2003	2980.32	2853.85	126.47
2003-2004	3678.09	3575.86	102.23
2004-2005	4048.87	3946.76	102.02
2005-2006	4334.37	4230.75	103.62
2006-2007	3568.02	3720.32	(152.30)
2007-2008	3730.03	3884.91	(154.88)

Source: Statistical Report, Resource Center, BPC.

Table 4.14: Employments in Travel and Tourism in Bangladesh during 1998 to 2003 (Thousands)

Employments	1998	1999	2000	2001	2002	2003	Change 2003/1998 (%)
Direct	721	746	782	759	735	739	2.5
Indirect	1036	1087	1212	1236	1215	1252	20.9
Total	1,757	1,833	1,994	1,995	1,950	1,991	13.4

Source: Country Reports, World Travel and Tourism Council, 2003.

Table 4.15: Importance of Travel and Tourism Jobs in Total Employment in Bangladesh, 2003 (%)

	Travel & Tourism Industry	Travel & Tourism Economy
Bangladesh	1.0	2.7
Regional average	2.3	6.9
World average	2.8	7.8

Source: Country Reports, World Travel and Tourism Council, 2003.

Table 4.16: Importance of Travel and Tourism Jobs in Total Employment in Bangladesh, 2008

	Travel & Tourism Industry	Travel & Tourism Economy
Employment (1000 Jobs)	801	2065
Percent of total	1.2	3.1
Annual growth (%; forecast) 2009–2018	2.6	3.1

Source: World Travel & Tourism Council, TSA Research 2008.

Table 4.17: Visitor Arrivals by Nationality

Nationality	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Afghanistan	61	107	61	28	10	7	20	105	221	104	58	113
Argentina	28	38	62	48	69	12	47	30	47	61	20	55
Australia	2324	2652	2684	2091	2377	2722	3409	3787	6815	3686	4878	7902
Austria	257	238	177	242	138	255	87	115	354	881	286	662
Bahrain	89	95	61	1083	66	31	40	38	24	55	43	78
Belgium	785	779	679	565	652	723	795	1089	1203	1080	838	1195
Bhutan	568	959	441	730	1010	1263	1241	1228	847	1187	1422	1600
Brazil	33	66	89	91	44	89	40	89	97	115	138	146
Canada	2696	3053	3815	2461	2723	5484	3603	5847	8964	4519	5085	10573
China	4016	4869	4379	5208	5901	6867	6681	7021	9238	6982	6985	11825
Clovakia	84	66	52	87	12	18	23	6	38	40	31	81

Table 4.17: Visitor Arrivals by Nationality. Contd.

Nationality	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Cyprus	8	15	26	6	14	8	7	44	35	14	1	17
Denmark	1088	1118	1194	1134	1162	1449	1248	1408	1930	1137	1268	1224
Egypt	496	316	388	449	334	383	208	170	294	663	756	830
Ethiopia	82	67	170	100	79	44	55	103	86	59	62	83
Finland	246	253	452	492	312	304	292	378	376	355	425	448
France	2299	2519	2263	2457	2336	2289	2589	2924	3157	2736	2674	3102
Germany	2708	3111	2986	2947	3080	2635	3297	4184	4812	3128	3190	4890
Greece	155	144	72	141	146	99	81	147	211	164	180	110
Hong Kong	332	409	541	472	739	551	332	310	270	103	264	254
Hungary	38	25	11	41	33	26	5	7	16	9	8	63
Iceland	7	6	12	40	32	6	91	1	3	0	103	1
India	53007	61606	57937	62935	74268	78090	80415	84704	80469	86232	60516	78568
Indonesia	602	811	798	1067	1250	1379	1455	1507	2155	2107	1676	1794
Iran	354	470	651	666	687	577	411	311	337	345	266	231
Iraq	49	51	46	60	50	67	24	18	60	12	64	48
Ireland	284	334	258	234	257	268	312	676	904	703	511	577
Italy	1522	1860	1992	1789	2118	1780	2112	2420	2629	1800	1667	2218
Japan	5716	6482	7808	7055	8006	7090	7325	6523	7857	6269	4370	5851
Jordan	142	89	191	106	136	185	236	383	373	206	238	348
Kenya	50	83	71	111	132	294	97	176	139	106	66	85
Korea	6017	6923	6154	6596	6746	6896	6511	7465	6575	5332	4135	6020
Kuwait	273	218	242	306	226	216	249	265	268	194	206	217
Lebanon	47	62	85	82	64	101	54	65	118	153	185	194
Libya	39	66	95	42	50	25	25	29	34	29	14	38
Malaysia	3927	2680	2857	2890	3827	3204	3706	3689	4750	1045	2671	6408
Maldives	97	123	63	53	189	129	150	182	98	220	693	1321
Mexico	24	27	40	82	195	119	121	88	106	94	95	89
Morocco	157	92	148	128	218	164	158	117	292	116	162	320
Myanmar	545	322	372	332	308	353	358	437	649	541	1074	3626
Nepal	3628	5296	4799	4733	4481	4280	4159	3904	3144	3378	3422	4537
Netherlands	3511	3784	2589	2767	2951	2508	2524	2735	2939	2431	1416	2287
New Zealand	492	588	681	664	666	440	773	1094	1606	1480	1084	1418
Nigeria	123	149	48	44	84	216	163	307	182	214	232	109
Norway	583	927	887	766	714	650	821	1002	1282	1025	725	954
Oman	168	40	187	147	211	222	101	63	78	153	164	330
Pakistan	7070	11481	12087	7894	10637	7010	8703	9238	11997	5671	6680	12224
Philippines	1066	1614	1520	1712	1909	1692	1550	1650	1648	1627	1930	2306
Poland	363	113	97	82	34	23	12	23	10	184	21	99
Portugal	79	87	124	94	109	90	71	45	108	167	220	169
Qatar	116	34	75	97	163	203	179	34	54	41	126	146

Table 4.17: Visitor Arrivals by Nationality. Contd.

Nationality	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Romania	54	609	198	64	7	27	0	5	4	6	38	77
Saudi Arabia	1259	1269	2128	2509	2049	1642	1468	1167	1134	731	1078	1437
Singapore	2257	2829	2830	2762	2271	2623	2920	2786	3073	1562	2321	3765
Somalia	82	38	38	19	39	4	53	90	47	36	19	50
South Africa	283	259	421	429	459	432	416	608	592	691	802	767
Spain	271	390	357	409	479	408	695	829	793	1091	958	1105
Sri Lanka	1522	1686	1653	1839	2427	3026	2524	2831	2826	2322	2410	3799
Sudan	87	65	179	172	306	38	42	40	91	17	104	126
Sweden	1584	1511	1298	1075	1455	1350	1536	2062	2360	2364	1869	3363
Switzerland	701	749	687	694	573	685	664	873	957	1264	978	950
Syria	86	61	90	66	83	111	119	96	66	134	254	214
Taiwan	829	1222	1427	1603	1649	1028	1621	1988	2655	2127	1662	2259
Thailand	1522	1645	3215	2159	2492	2881	3997	4188	3376	2955	3469	3484
Turkey	174	349	184	326	254	443	375	510	559	674	820	1048
UAE	265	96	441	226	268	508	343	120	94	33	17	260
UK	33463	28115	19605	22510	29106	34087	28905	42138	52410	24955	37136	51314
USA	11033	12070	11358	9557	11924	13394	13622	24458	27895	13422	19604	34638
USSR Former	678	748	647	574	24	26	64	59	118	263	1122	1216
Vietnam	63	124	68	67	86	90	163	173	304	88	480	122
Yemen	169	63	99	78	68	53	51	48	188	138	181	264
Yugoslavia	44	57	13	38	14	0	5	1	14	4	3	15
Zimbabwe	26	52	69	67	34	53	35	77	92	31	37	25
Subtotal	164903	181324	170522	171690	198022	206445	206584	243328	269547	203861	198706	288082
Others	984	1096	14439	1091	1189	754	662	1181	1723	3801	1605	1028
Total	165887	182420	184961	172781	199211	207199	207246	244509	271270	207662	200311	289110

Source: Special Branch, Bangladesh Police.

Table 4.18: Foreign Exchange Earnings from Tourism and Other Travels during 1996 to 2008

Month	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Jan	70.2	231.8	351.2	184.9	227.8	273.8	297.5	259	457	450.42	653.71	561.13	
Feb	73.4	106.5	146	224.9	261.6	218.1	260.6	327	393.7	502.73	554.11	624.04	
Mar	81.3	142.6	302.7	255.3	230.9	196.1	336.2	355.9	425.9	468.5	538.94	471.9	
Apr	84.2	130.5	170.6	207.2	234	219	312.5	241.1	309.4	335.56	411.62	387.22	
May	121.8	182.9	161.7	172.3	210.7	240.5	282.7	226.3	305	347.95	452.02	449.95	
Jun	137.1	172.2	179.8	182.7	193.1	221.7	313	288	279.7	301.23	394.96	366.17	
Jul	98.1	156.7	167.5	167	234.8	207.1	267.5	302.3	303.6	296.98	398.14	346.63	
Aug	111.4	145.2	192.5	182.8	129.3	170.5	251.5	232	285.9	354.61	424.16	363.72	
Sep	99.4	692.8	154.5	179.7	218.1	193.4	245.9	217.3	293.1	334.14	362.29	342.54	
Oct	157.4	256.1	167.3	196.1	239.4	187	205	265.1	247.9	332.67	327.95	359.68	
Nov	176.5	253.2	245.5	280.5	234.5	234.8	277.7	224.2	250.42	324.45	444.5	440.25	
Dec	190.4	270.9	215.5	218.5	212.8	291.8	262.5	371.8	415.94	444.65	568.25	551.96	
Total	1401.2	2741.4	2454.8	2451.9	2627	2653.8	3312.6	3310	3967.56	4493.89	5530.65	5265.19	6124.5
% Change		95.65	-10.45	-0.12	7.14	1.02	24.82	-0.08	19.87	13.27	23.07	-4.80	16.32
Million \$	33.59	62.45	52.37	49.95	50.37	47.56	57.21	56.98	66.82	70.01	80.44	76.4	88.76

Source: Bangladesh Bank.