

The Tourism Value Chain and the Prospect of Pro-Poor Tourism in Cox's Bazar, Bangladesh

by

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ABSTRACT

The Tourism Value Chain and the Prospect of Pro-Poor Tourism in Cox's Bazar, Bangladesh

Pro-poor tourism has been adopted by a range of governments and non-governmental organisations (NGOs) as a key contributor to poverty alleviation strategies in developing countries. It is based on the principle that the poor should receive net benefits from participation in tourism (Ashley et al. 2001). However, there is a range of literature which challenges tourism's claim to be a catalyst for poverty reduction. The aims of this research are to analyse the extent to which tourism contributes to poor households' incomes and to examine the prospect of pro-poor tourism in the resort of Cox's Bazar in Bangladesh. Value chain analysis is employed to identify linkages and leakages and to measure the contribution of tourists' expenditure to poor households' incomes. Quantitative methods incorporating convenience and *ad hoc* techniques are used to gather primary data from a sample of 396 participants using structured close ended questionnaires.

The results indicate that the average poverty headcount ratio is 0.36 and the contribution to poor households' incomes from tourists' expenditure is 4.8 per cent. However, there is significant variation in the level of contribution from different types of tourists and from different segments of the tourism value chain. The two main factors which determine the level of contribution to poor households from the tourism value chain are extent of linkages in supply chains and the number of poor people directly employed in businesses. The research findings indicate that the tourism value chain in Cox's Bazar may be classified as pro-poor in that it contributes to poor households' incomes. However further steps are required to develop a tourism value chain which incorporates the wider socio-cultural and political dimensions of pro-poor tourism. This research proposes a tourism value chain mapping model which integrates poor households and incorporates different tourism segments and actors in the informal as well as formal labour markets. It also contributes to knowledge in the field by proposing a framework which examines different impacts on poverty of income channels from domestic and international tourists and linkages to local formal and informal tourism value chains. Finally, this research will contribute to literature on the prospect of pro-poor tourism in Cox's Bazar, Bangladesh.

TABLE OF CONTENTS

| | |
|---|------|
| COPYRIGHT STATEMENT | i |
| ABSTRACT | ii |
| TABLE OF CONTENTS | iii |
| LIST OF TABLES | viii |
| CONFERENCE PAPERS AND PUBLICATION FROM THIS THESIS | ii |
| ACKNOWLEDGEMENTS | iii |
| AUTHOR'S DECLARATION | iv |
| LIST OF ABBREVIATIONS | v |
| CHAPTER 1: INTRODUCTION TO THE RESEARCH | 1 |
| 1.1 Introduction..... | 1 |
| 1.2 Research Background..... | 2 |
| 1.3 The Concept of Pro-Poor Tourism..... | 4 |
| 1.4 Research Location | 6 |
| 1.5 Rationale and Significance of the Research..... | 7 |
| 1.6 Research Aim..... | 9 |
| 1.7 Research Objectives | 9 |
| 1.8 Research Questions..... | 10 |
| 1.9 Research Framework | 10 |
| 1.10 Thesis Structure | 13 |
| 1.11 Chapter Summary | 17 |
| CHAPTER 2: LITERATURE REVIEW | 18 |
| 2.1 Introduction..... | 18 |
| 2.2 Tourism and Economic Growth | 19 |
| 2.3 Tourism and Poverty Alleviation | 21 |
| 2.4 Conceptualisation and Measurement of Poverty | 26 |
| 2.5 Methods of Measuring Poverty..... | 31 |
| 2.6 Tourism Value Chain Characteristics and Poverty Alleviation | 32 |
| 2.7 Tourism Value Chain Analysis and Poverty Alleviation | 35 |
| 2.8 Linkages in the Tourism Value Chain..... | 39 |
| 2.9 Leakages in the Tourism Value Chain..... | 41 |
| 2.10 Significance of Domestic Tourism in Developing Countries | 43 |
| 2.11 Informal Labour Market in Developing Economies | 47 |
| 2.12 Critiques of Pro-Poor Tourism | 50 |
| 2.13 Pro-Poor Tourism and Community-Based Tourism..... | 53 |
| 2.14 Chapter Summary | 55 |
| CHAPTER 3: ECONOMY, TOURISM AND POVERTY IN BANGLADESH | 58 |
| 3.1 Introduction..... | 58 |

| | |
|---|-----|
| 3.2 An Overview of the People's Republic of Bangladesh..... | 58 |
| 3.3 Overview of the Economy in Bangladesh | 62 |
| 3.4 Foreign Investment in the Bangladeshi Economy | 66 |
| 3.5 The Banking Sector in the Bangladeshi Economy..... | 67 |
| 3.6 Government Economic Development Strategies in Bangladesh | 68 |
| 3.7 The Tourism Industry in Bangladesh..... | 69 |
| 3.8 Gender and Employment in Bangladesh | 74 |
| 3.9 Government Tourism Development Strategies in Bangladesh | 75 |
| 3.10 Analysis of Poverty Indicators in Bangladesh..... | 78 |
| 3.11 Poverty Alleviation Strategic Plans in Bangladesh | 84 |
| 3.11.1 Social Safety Net Programmes (SSNPs) | 85 |
| 3.11.2 Microfinance Initiatives..... | 86 |
| 3.12 Economy and Tourism in Cox's Bazar..... | 87 |
| 3.13 Poverty in Cox's Bazar | 90 |
| 3.14 Chapter Summary | 92 |
| CHAPTER 4: RESEARCH DESIGN, METHODOLOGY AND METHODS..... | 94 |
| 4.1 Introduction..... | 94 |
| 4.2 Research Philosophy and Approach | 94 |
| 4.3 Research Methodology..... | 97 |
| 4.3.1 Value Chain Analysis Selection | 98 |
| 4.3.2 Research Setting Area..... | 99 |
| 4.4 Data Collection Process | 101 |
| 4.4.1 Preparation for Fieldwork Research and Data Collection | 103 |
| 4.4.2 Questionnaires Design and Structured Interviews | 105 |
| 4.4.3 Questionnaires for Tourists..... | 107 |
| 4.4.4 Questionnaires for Business Actors | 107 |
| 4.5 Sample Selection | 109 |
| 4.5.1 Sample Size Collection Timeframe | 113 |
| 4.5.2 Sample Size Response Rate | 114 |
| 4.6 Data Analysis | 115 |
| 4.6.1 Calculation of Contribution to Household Incomes | 117 |
| 4.6.2 Tourist Total Contribution to Local Household Incomes..... | 119 |
| 4.6.3 Calculation of Poverty Head Count Ratio..... | 120 |
| 4.6.4 Poverty Headcount Ratio for Each Occupation..... | 121 |
| 4.6.5 Tourism's Contribution to Poor Households' Incomes | 122 |
| 4.7 Limitations and Challenges | 124 |
| 4.7.1 Challenges in Fieldwork Data Collection Process..... | 125 |
| 4.7.2 Challenges of Data Collection from Tourists and Businesses..... | 125 |
| 4.7.3 Challenges Related to Households' Data Collection..... | 127 |
| 4.7.4 Ethical Compliance in Fieldwork Research..... | 128 |
| 4.8 Chapter Summary | 129 |
| CHAPTER 5: MAPPING THE TOURISM VALUE CHAIN IN COX'S BAZAR.. | 130 |
| 5.1 Introduction..... | 130 |
| 5.2 Tourists' Profile..... | 131 |

| | |
|---|-----|
| 5.2.1 Tourist Types and Purpose of Visit | 132 |
| 5.2.2 Types of Tourist Expenditure Patterns..... | 133 |
| 5.2.3 Tourist Expenditure by Sector..... | 134 |
| 5.3 Tourism Supply Chain Mapping | 136 |
| 5.4 Tourism Value Chain: Accommodation | 139 |
| 5.4.1 Business Characteristics..... | 140 |
| 5.4.2 Star Rating Types of Accommodation..... | 141 |
| 5.4.3 Occupancy Rate | 141 |
| 5.4.4 Male and Female Employment | 142 |
| 5.4.5 Monthly Expenditure | 142 |
| 5.4.6 Direct and Indirect Contribution | 144 |
| 5.4.7 Linkages and Leakages | 144 |
| 5.4.8 Tourism Value Chain Mapping Framework..... | 146 |
| 5.5 Tourism Value Chain: Restaurants..... | 149 |
| 5.5.1 Seating Capacity..... | 149 |
| 5.5.2 Male and Female Employment | 150 |
| 5.5.3 Monthly Expenditure | 150 |
| 5.5.4 Direct and Indirect Contribution | 151 |
| 5.5.5 Linkages and Leakages | 152 |
| 5.5.6 Tourism Value Chain Mapping Framework..... | 153 |
| 5.6 Tourism Value Chain: Street Food Vendors | 156 |
| 5.6.1 Business Characteristics..... | 156 |
| 5.6.2 Monthly Expenditure | 157 |
| 5.6.3 Direct and Indirect Contribution | 158 |
| 5.6.4 Linkages and Leakages | 159 |
| 5.6.5 Tourism Value Chain Mapping Framework..... | 160 |
| 5.7 Tourism Value Chain: Local Beverage Shops | 163 |
| 5.7.1 Business Characteristics..... | 163 |
| 5.7.2 Monthly Expenditure | 163 |
| 5.7.3 Direct and Indirect Contribution | 164 |
| 5.7.4 Linkages and Leakages | 165 |
| 5.7.5 Tourism Value Chain Mapping Framework..... | 165 |
| 5.8 Tourism Value Chain: Dried Fish Retailers..... | 167 |
| 5.8.1 Business Characteristics..... | 167 |
| 5.8.2 Monthly Expenditure | 168 |
| 5.8.3 Direct and Indirect Contribution | 169 |
| 5.8.4 Linkages and Leakages | 169 |
| 5.8.5 Tourism Value Chain Mapping Framework..... | 170 |
| 5.9 Tourism Value Chain: Handicrafts Retailers..... | 172 |
| 5.9.1 Business Characteristics..... | 172 |
| 5.9.2 Monthly Expenditure | 173 |
| 5.9.3 Direct and Indirect Contribution | 173 |
| 5.9.4 Sourcing Handicrafts Products | 174 |
| 5.9.5 Linkages and Leakages | 175 |
| 5.9.6 Tourism Value Chain Mapping Framework..... | 176 |

| | |
|--|-----|
| 5.10 Tourism Value Chain: Handicrafts Street Vendors | 178 |
| 5.10.1 Business Characteristics..... | 178 |
| 5.10.2 Handicrafts Street Vendors' Residences | 179 |
| 5.10.3 Monthly Expenditure | 179 |
| 5.10.4 Direct and Indirect Contribution | 180 |
| 5.10.5 Linkages and Leakages | 181 |
| 5.10.6 Tourism Value Chain Mapping Framework..... | 181 |
| 5.11 Tourism Value Chain: Tuk Tuk Drivers..... | 183 |
| 5.11.1 Business Characteristics..... | 183 |
| 5.11.2 Monthly Income and Expenditure Statement | 184 |
| 5.11.3 Direct and Indirect Contributions..... | 184 |
| 5.11.4 Linkages and Leakages | 185 |
| 5.11.5 Tourism Value Chain Mapping Framework..... | 186 |
| 5.12 Tourism Value Chain: Rickshaw Pullers..... | 188 |
| 5.12.1 Business Characteristics..... | 188 |
| 5.12.2 Monthly Income and Expenditure Statement | 189 |
| 5.12.3 Direct and Indirect Contribution | 190 |
| 5.12.4 Linkages and Leakages | 190 |
| 5.12.5 Tourism Value Chain Mapping Framework..... | 191 |
| 5.13 Tourism Value Chain: Tours and Beach Activities..... | 193 |
| 5.13.1 Business Characteristics..... | 193 |
| 5.13.2 Monthly Statement..... | 194 |
| 5.13.3 Direct and Indirect Contributions..... | 194 |
| 5.13.4 Linkages and Leakages | 195 |
| 5.14 Business Characteristics: Beach Photographers..... | 195 |
| 5.14.1 Monthly Expenditure | 196 |
| 5.14.2 Direct and Indirect Contribution | 197 |
| 5.14.3 Linkages and Leakages | 197 |
| 5.15 Tourism Value Chain: Jeep Tours | 198 |
| 5.15.1 Monthly Expenditure | 199 |
| 5.15.2 Direct and Indirect Contribution | 199 |
| 5.15.3 Linkages and Leakages | 200 |
| 5.15.4 Tourism Value Chain Mapping Framework..... | 200 |
| 5.16 Tourism Value Chain Conceptual Framework for Cox's Bazar..... | 203 |
| 5.16.1 Analysis of Tourism Value Chain Mapping Framework..... | 203 |
| 5.16.2 Tourism Expenditure Flow and Poverty Reduction | 206 |
| 5.17 Chapter Summary | 207 |
| CHAPTER 6: TOURISM VALUE CHAIN AND POVERTY REDUCTION..... | 209 |
| 6.1 Introduction..... | 209 |
| 6.2 Profile of Households | 210 |
| 6.2.1 Household Expenditure (Non-Durable and Durable) | 211 |
| 6.2.2 Poverty Headcount by Village | 212 |
| 6.2.3 Household Ethnic Group and Poverty Headcount Ratio | 214 |
| 6.2.4 Occupations and Poverty Headcount Ratio | 217 |

| | |
|---|-----|
| 6.2.5 Employment and Poverty Headcount Ratio | 218 |
| 6.3 Contribution to Poor Households by Tourists Expenditure | 220 |
| 6.3.1 Contribution to Poor Households by Holiday Tourists..... | 220 |
| 6.3.2 Contribution to Poor Households by Business Tourists | 221 |
| 6.3.3 Contribution to Poor Households by Conference Tourists | 222 |
| 6.3.4 Contribution to Poor Households by NGO Tourists | 223 |
| 6.3.5 Contribution to Poor Households by Day Visitors | 225 |
| 6.3.6 Contribution to Poor Households by VFF Tourists | 225 |
| 6.3.7 Tourists' Contribution to Poor Households Income | 226 |
| 6.3.8 Contribution to Poor Households by Tourist Segments | 227 |
| 6.4 Business Actors' Contribution to Poor Households | 228 |
| 6.5 Chapter Summary | 229 |
| CHAPTER 7: DISCUSSION AND RECOMMENDATIONS | 231 |
| 7.1 Introduction..... | 231 |
| 7.2 Addressing the Research Questions | 232 |
| 7.2.1 Research Question 1 | 232 |
| 7.2.2 Research Question 2 | 234 |
| 7.2.3 Research Question 3 | 238 |
| 7.2.4 Research Question 4 | 240 |
| 7.2.5 Research Question 5 | 242 |
| 7.2.6 Research Question 6 | 244 |
| 7.2.7 Research Question 7 | 245 |
| 7.3 Recommendations | 249 |
| 7.4 Recommendations Relating to Tourists..... | 249 |
| 7.5 Recommendations Relating to Business Actors..... | 252 |
| 7.6 Recommendations Relating to Poor Households in Cox's Bazar | 256 |
| 7.7 Recommendations Relating to Tourism Strategy for Bangladesh | 257 |
| 7.8 Research Limitations | 259 |
| 7.9 Suggestions for Further Research..... | 260 |
| 7.10 Contribution to Knowledge | 262 |
| 7.11 Final Remarks | 266 |
| REFERENCES | 269 |

LIST OF TABLES

| | |
|---|-----|
| Table 2. 1: Three Stage Framework for Value Chain Analysis. | 38 |
| Table 3. 1: Bangladesh Demographic Information | 61 |
| Table 3. 2: Economic Activity Breakdown in Bangladesh..... | 63 |
| Table 3. 3: Incremental Contribution to GDP Growth 2013-2017..... | 64 |
| Table 3. 4: Ten Largest Bangladeshi Companies by Trading Value 2018 | 65 |
| Table 4. 1: Research Philosophical Dimensions and Research Methods | 95 |
| Table 4. 2: Steps Involved in Value Chain Diagnosis..... | 102 |
| Table 4. 3: Selected 12 Business Actors Questionnaires | 108 |
| Table 4. 4: Tourists Sample Selection | 111 |
| Table 4. 5: Business Actors Sample Selection | 111 |
| Table 4. 6: Household Sample Selection..... | 112 |
| Table 4. 7: A Detailed Breakdown of Primary Data Collection Timeframe | 113 |
| Table 4. 8: Response Rate of Research Participants | 115 |
| Table 5. 1: Tourists' Characteristics | 131 |
| Table 5. 2: Tourists' Residency Status..... | 132 |
| Table 5. 3: Types of Tourists and Purpose of Visit..... | 133 |
| Table 5. 4: Tourists' Purpose of Visit and Major Expenditure | 134 |
| Table 5. 5: Tourism Spend by Category | 135 |
| Table 5. 6: Monthly Income and Expenditure Statement: Supplier | 138 |
| Table 5. 7: Business Characteristics: Accommodation | 141 |
| Table 5. 8: Star Rating | 141 |
| Table 5. 9: Occupancy Rate | 142 |
| Table 5. 10: Male and Female Employment | 142 |
| Table 5. 11: Monthly Income and Expenditure Statement | 143 |
| Table 5. 12: Direct and Indirect Contribution..... | 144 |
| Table 5. 13: Linkages and Leakages | 146 |
| Table 5. 14: Number of Seats: Restaurants..... | 149 |
| Table 5. 15: Male Female Employment | 150 |
| Table 5. 16: Monthly Income and Expenditure Statement | 151 |
| Table 5. 17: Direct and Indirect Contribution..... | 152 |
| Table 5. 18: Linkages and Leakages | 153 |
| Table 5. 19: Business Characteristics: Street Food Vendors..... | 157 |
| Table 5. 20: Monthly Income and Expenditure Statement | 158 |
| Table 5. 21: Direct and Indirect Contribution..... | 159 |
| Table 5. 22: Linkages and Leakages | 159 |
| Table 5. 23: Business Characteristics: Local Shops Beverages | 163 |
| Table 5. 24: Monthly Income and Expenditure Statement | 164 |
| Table 5. 25: Direct and Indirect Contribution..... | 164 |
| Table 5. 26: Linkages and Leakages | 165 |
| Table 5. 27: Business Characteristics: Dried Fish Retailers | 168 |
| Table 5. 28: Monthly Income and Expenditure Statement | 168 |
| Table 5. 29: Direct and Indirect Contribution..... | 169 |
| Table 5. 30: Linkages and Leakages | 170 |

| | |
|--|-----|
| Table 5. 31: Business Characteristics: Handicraft Retailers | 172 |
| Table 5. 32: Monthly Income and Expenditure Statement | 173 |
| Table 5. 33: Direct and Indirect Contribution..... | 174 |
| Table 5. 34: Sourcing by Country..... | 175 |
| Table 5. 35: Linkages and Leakages | 175 |
| Table 5. 36: Business Characteristics: Handicrafts Street Vendors | 178 |
| Table 5. 37: Residence Street Vendors Handicrafts | 179 |
| Table 5. 38: Monthly Income and Expenditure Statement | 180 |
| Table 5. 39: Direct and Indirect Contribution..... | 180 |
| Table 5. 40: Linkages and Leakages | 181 |
| Table 5. 41: Business Characteristics: Tuk Tuk Drivers..... | 183 |
| Table 5. 42: Monthly Income and Expenditure Statement | 184 |
| Table 5. 43: Direct and Indirect Contribution..... | 185 |
| Table 5. 44: Linkages and Leakages | 185 |
| Table 5. 45: Business Characteristics: Rickshaw Pullers..... | 189 |
| Table 5. 46: Monthly Income and Expenditure Statement | 189 |
| Table 5. 47: Direct and Indirect Contribution..... | 190 |
| Table 5. 48: Linkages and Leakages | 191 |
| Table 5. 49: Business Characteristics: Beach Umbrella Rentals | 193 |
| Table 5. 50: Monthly Income and Expenditure Statement | 194 |
| Table 5. 51: Direct and Indirect Contribution..... | 194 |
| Table 5. 52: Linkages and Leakages | 195 |
| Table 5. 53: Business Characteristics: Beach Photographers | 196 |
| Table 5. 54: Monthly Income and Expenditure Statement | 196 |
| Table 5. 55: Direct and Indirect Contribution..... | 197 |
| Table 5. 56: Linkages and Leakages | 197 |
| Table 5. 57: Business Characteristics: Jeep Tours | 198 |
| Table 5. 58: Monthly Income and Expenditure Statement | 199 |
| Table 5. 59: Direct and Indirect Contribution..... | 199 |
| Table 5. 60: Linkages and Leakages | 200 |
| Table 6. 1: Households' Characteristics..... | 210 |
| Table 6. 2: Households' Expenditure (Non-Durable and Durable) | 212 |
| Table 6. 3: Poverty Headcount by Village | 213 |
| Table 6. 4: Households' Ethnic Group and Poverty Headcount Ratio | 215 |
| Table 6. 5: Occupations and Poverty Headcount Ratio | 217 |
| Table 6. 6: Employment and Poverty Headcount Ratio | 219 |
| Table 6. 7: Holiday Tourists Contribution to Poor Households..... | 221 |
| Table 6. 8: Business Tourists' Contribution to Poor Households | 222 |
| Table 6. 9: Conference Tourists' Contribution to Poor Households | 223 |
| Table 6. 10: NGO Tourists' Contribution to Poor Households..... | 224 |
| Table 6. 11: Day Visit Tourists Spend and Contribution to Poor Households' | 225 |
| Table 6. 12: Visiting F and F Tourist Contribution to Poor Households..... | 226 |
| Table 6. 13: Income for Poor by Tourist Categories..... | 227 |
| Table 6. 14: Tourists Segments Contribution to Poor Households..... | 228 |
| Table 6. 15: Business Actors Contribution to Poor Households..... | 228 |

LIST OF FIGURES

| | |
|--|-----|
| Figure 1. 1: Research Conceptual Framework..... | 12 |
| Figure 2. 1: Tourism and Poverty Reduction..... | 25 |
| Figure 2. 2: Pyramid of Poverty Concepts | 29 |
| Figure 2. 3: Typology of tourism in the developing countries | 45 |
| Figure 4. 1: Research Philosophical Dimensions and Research Methods | 96 |
| Figure 4. 2: Research Approaches | 97 |
| Figure 4. 3: Rationale for Selection of Tourism Value Chain Analysis | 99 |
| Figure 4. 4: Data Analysis of Tourists Contribution to Households | 116 |
| Figure 4. 5: Direct and Indirect Contribution to Households (Stage 1) | 118 |
| Figure 4. 6: Tourism Expenditure to Business Actor (Stage 2) | 119 |
| Figure 4. 7: Calculate the Tourists total Contribution on households | 120 |
| Figure 4. 8: Calculation of Poverty Head Count Ratio..... | 121 |
| Figure 4. 9: Poverty Headcount Ratio for Each Actor | 123 |
| Figure 4. 10: Tourists Contribution to Poor Households' Income..... | 124 |
| Figure 5. 1: Supply Chain Mapping Framework-Cox's Bazar | 137 |
| Figure 5. 2: Tourism Value Chain Framework: Accommodation..... | 148 |
| Figure 5. 3: Tourism Value Chain Framework: Restaurants | 155 |
| Figure 5. 4: Tourism Value Chain Framework: Street Food Vendors..... | 162 |
| Figure 5. 5: Tourism Value Chain Framework: Beverages | 166 |
| Figure 5. 6: Tourism Value Chain Framework: Dried Fish Retailers | 171 |
| Figure 5. 7: Tourism Value Chain Framework: Handicrafts Retailers | 177 |
| Figure 5. 8: Tourism Value Chain Framework: Handicrafts Street Vendors.... | 182 |
| Figure 5. 9: Tourism Value Chain Framework: Tuk Tuk Drivers | 187 |
| Figure 5. 10: Tourism Value Chain Framework: Rickshaw Pullers | 192 |
| Figure 5. 11: Tourism Value Chain Framework: Tours and Beach Activities .. | 202 |
| Figure 5. 12: Tourism Value Chain Mapping Framework..... | 205 |
| Figure 5. 13: Tourism Value Chain Analysis and Poverty Reduction | 206 |
| Figure 7. 1: Impact of Tourists' Expenditure on Poor Households' Income..... | 265 |

LIST OF PICTURES

| | |
|---|-----|
| Picture 5. 1: Fish Suppliers in Cox's Bazar. | 139 |
| Picture 5. 2: Street Food Vendors..... | 160 |
| Picture 5. 3: Beach Photographers Pictures | 198 |
| Picture 6. 1: Data Collection Households..... | 216 |

LIST OF MAPS

| | |
|---|-----|
| Map 3. 1: Map of Bangladesh | 62 |
| Map 4. 1: Map of Cox's Bazar, Bangladesh..... | 101 |

LIST OF APPENDICES

| | |
|---|-----|
| Appendix 1: Letter for Tourists' Actors and Households in Cox's Bazar | 310 |
| Appendix 2: Letter for Tourists Arrival and Departure in Bangladesh | 311 |
| Appendix 3: Letter for Tourists Arrival and Departure in Cox's Bazar | 312 |
| Appendix 4: A Permission Letter to Cox's Bazar Municipality | 313 |
| Appendix 5: A Structured Questionnaire: Tourists | 314 |
| Appendix 6: A Structured Questionnaire: Accommodation | 317 |
| Appendix 7: A Structured Questionnaire: Restaurants..... | 319 |
| Appendix 8: A Structured Questionnaire: Suppliers | 321 |
| Appendix 9: A Structured Questionnaire : Handicrafts Retailers..... | 323 |
| Appendix 10: A Structured Questionnaire: Dried Fish Retailers..... | 325 |
| Appendix 11: A Structured Questionnaire: Street Vendors | 327 |
| Appendix 12: A Structured Questionnaire: Tuk Tuk Drivers..... | 329 |
| Appendix 13: A Structured Questionnaire: Rickshaw Pullers..... | 331 |
| Appendix 14: A Structured Questionnaire: Local Shop Beverage..... | 333 |
| Appendix 15: A Structured Questionnaire: Beach Photographers | 335 |
| Appendix 16: A Structured Questionnaire: Beach Umbrellas Rental | 337 |
| Appendix 17: A Structured Questionnaire: Jeep Tour Operators..... | 339 |
| Appendix 18: A Structured Questionnaire: Households | 341 |
| Appendix 19: Consent Form for Tourists, Businesses and Households | 345 |
| Appendix 20: Areas for Improvement (Tourist) in Cox's Bazar | 346 |
| Appendix 21: Currency and Poverty Headcount Ratio Formula..... | 347 |

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This thesis is dedicated with love and gratitude to my parents and my sisters Anjoly and Shamoly who have faced hardship all their lives. In loving memory of my father Alfred Gomes.

AUTHOR'S DECLARATION

I declare that this thesis is my own work and that, to the best of my knowledge, it contains no material previously published by another person, except where explicit reference is made to the contribution of others. I further declare that the contents of this thesis have not been submitted for any other degree at Bournemouth University or any other institution of higher education.

Signature: 

Printed Name: Babul Thomas Gomes

Date: 18th November 2020

LIST OF ABBREVIATIONS

| | |
|---------|---|
| ADB | Asian Development Bank |
| ASA | Association for Social Advancement |
| ATAB | Association of Travel Agents of Bangladesh |
| BB | Bangladesh Bank |
| BBIN | Bangladesh Bhutan India Nepal Initiative |
| BBS | Bangladesh Bureau of Statistics |
| BEPZA | Bangladesh Export Processing Zones Authority |
| BPC | Bangladesh Parjatan Corporation |
| BRAC | Bangladesh Rural Advancement Committee |
| BRDB | Bangladesh Rural Development Board |
| BCIM | Bangladesh-China-India-Myanmar Forum for Regional Cooperation |
| BUROB | Basic Unit for Resources and Opportunities Bangladesh |
| BIMSTEC | Bengal Initiative for Multi-Sectoral Technical and Economic Cooperation |
| BRIC | Brazil, Russia, India and China |
| CIA | Central Intelligence Agency |
| CPD | Centre for Policy Dialogue |
| CSE | Chittagong Stock Exchange |
| CGE | Computable General Equilibrium |
| CBN | Cost Basic Needs |
| COXDA | Cox's Bazar Development Authority |
| DFID | Department for International Development |
| D8 | Developing -8 Organisation for Economic Cooperation |
| DFI | Development Financial Institutions |
| DSE | Dhaka Stock Exchange |
| EPZ | Export Processing Zones |
| FAO | Food and Agriculture Organisation |
| FCB | Foreign Commercial Banks |
| FDI | Foreign Direct Investment |
| GED | General Economics Division |
| GDP | Gross Domestic Product |
| HIES | Household Income and Expenditure Survey |
| HPI | Human Poverty Index |
| IORA | Indian-Ocean Rim Association |
| ICT | Information and Communications Technology |
| IMF | International Monetary Fund |
| MRA | Microcredit Regulatory Authority |
| MFI | Microfinance Institutions |
| MIC | Middle-Income Country |
| MDGs | Millennium Development Goals |

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| MOCAT | Ministry of Civil Aviation and Tourism |
| MRGI | Minority Rights Group International |
| MPI | Multidimensional Poverty Index |
| NBRB | National Board of Revenue Bangladesh |
| NHAB | National Hotel Association of Bangladesh |
| N11 | Next Eleven |
| NGO | Non-Government Organisations |
| OIC | Organisation of Islamic Cooperation |
| ODI | Overseas Development Institute |
| PKSF | Palli Karma Sahayak Foundation |
| PRC | Pew Research Center |
| PRGF | Poverty Reduction and Growth Facility |
| PRSP | Poverty Reduction Strategic Plan |
| PCB | Private Commercial Banks |
| PPT | Pro-Poor Tourism |
| PSCB | Public Sector Commercial Banks |
| PPP | Public-Private Partnership |
| PPP | Purchasing Power Parity |
| RMG | Ready-Made Garments |
| RDCD | Rural Development and Cooperatives Division |
| SMME | Small, Medium and Micro Enterprises |
| SAM | Social Accounting Matrices |
| SSNP | Social Safety Net Programmes |
| SAARC | South Asian Association for Regional Cooperation |
| SDGs | Sustainable Development Goals |
| ST-EP | Sustainable Tourism for Eliminating Poverty Programme |
| TOAB | Tour Operators' Association Bangladesh |
| TSA | Tourism Satellite Accounts |
| TVCA | Tourism Value Chain Analysis |
| UK | United Kingdom |
| UNWTO | United Nations World Tourism Organisation |
| UNCTAD | United Nations Conference on Trade and Development |
| UNDP | United Nations Development Programme |
| UNEP | United Nations Environment Programme |
| UNOCHA | United Nations Office for the Coordination of Humanitarian Affairs |
| VCA | Value Chain Analysis |
| WB | World Bank |
| WHO | World Health Organisation |
| WTO | World Trade Organisation |
| WTTC | World Travel and Tourism Council |

CHAPTER 1: INTRODUCTION TO THE RESEARCH

1.1 Introduction

This research is concerned with the relationship between tourism expenditure and poverty alleviation. Specifically, this thesis aims to examine the extent to which expenditure in the tourism value chain is transmitted to poor households in the resort of Cox's Bazar in Bangladesh. The research method involves mapping the tourism value chain in order to identify leakages from and linkages to the local economy and the direct and indirect contribution to poor households' income. A five-stage conceptual research framework is developed which is based on principles and practice relating to pro-poor tourism and tourism value chain analysis. The scope of the analysis of the tourism value chain goes beyond the accommodation and food segments and incorporates twelve business actors engaged in formal and informal economic activities. The analysis also differentiates between the expenditure of categories of tourists in terms of linkages with the local tourism value chain and contribution to poor households' income. The fundamental question underpinning this research is the extent to which tourism in Cox's Bazar can be classified as pro-poor.

In this chapter the background to this research is outlined and the research aims, and objectives are stated. An overview of the definition and principles related to the concept of pro-poor tourism is presented together with an outline of its evolution. The reasons for the selection of Cox's Bazar as the location for the research are explained. In the following section, the significance and rationale of the research is discussed. The research aim, research objectives and questions are specified and the conceptual research framework underpinning this thesis is illustrated. Finally, the structure of the thesis is

outlined together with a list of chapter headings with brief synopses of each chapter.

1.2 Research Background

Tourism has been described as ‘the single largest peaceful movement of people across cultural boundaries in the history of the world’ (Lett 1989, p.277). The development of a tourism industry is regarded by governments of many developing economies as a route to modernisation and even westernisation (Roche 1992; Williams 1998; Telfer and Sharpley 2008). According to data from the World Travel and Tourism Council (WTTC 2020), globally in 2019 the travel and tourism industry’s direct contribution to GDP was estimated at USD 8.9 trillion which constitutes a total contribution of 10.2 per cent of GDP. Over 330 million people are employed in the tourism industry worldwide, which would indicate that that one in every ten jobs worldwide is tourism related (WTTC 2020). It is claimed that each mainstream job in the tourism industry generates another one and half jobs in the tourism supply chain (World Bank 2017). The claims made regarding tourism’s potential to provide employment and alleviate poverty are ambitious. In the Manila Declaration the World Tourism Organisation (WTO 1980) asserts that the tourism industry can contribute to ‘a new international economic order and it has been described as a weapon to fight the ‘war on poverty’ (WTO 2005 cited by Scheyvens 2007). A range of transnational organisations including the World Bank (WB), The United Nations Educational, Scientific and Cultural Organization (UNESCO), The United Nations World Tourism Organisation (UNWTO), the Overseas Development Institute (ODI) and the Asian Development Bank (ADB) have declared that tourism has the potential to create employment and alleviate poverty in developing economies (Scheyvens 2007; Ivanovic 2008). UNWTO (2010) goes

as far as to assert that tourism is the most viable option, in terms of economic development in many developing economies.

The diverse and diffuse nature of tourism is encapsulated by its conceptualisation as a collection of activities, service and industries which deliver a travel experience (Macintosh and Goeldner 1998; Sharpley 2014). These activities include transportation, accommodation, food and beverage services, retail services, souvenirs, excursions and vehicle hire. Consequently, the tourism industry is recognised as having the potential to create a relatively high level of backward linkages to the local economy based on tourists' demand for such goods and services (Sharma 2004; Sofield et al. 2004; Spenceley and Meyer 2012). Emphasis is placed on the *trickle-down* effect which it is claimed can benefit poor households directly and indirectly involved in the tourism industry. The development of the tourism sector in many developing countries is prioritised because of its perceived potential for generating employment due to its labour intensive nature (Jamieson et al. 2004). Aspects of tourism which are cited as making it conducive to poverty reduction include the notion that many tourism jobs are accessible to poor people, connectivity within the tourism supply chain which facilitates a multiplier effect and the creation of linkages between consumers and producers which may generate tangible and intangible benefits (Ashley and Roe 2002). From a gender perspective, Roe et al (2004) note that the labour intensive employment opportunities provided by tourism also provide more job and income earning opportunities for women than other sectors of the economy.

However, there is a wide range of literature based on other research which contests the assertion that poor households in tourist destinations in developing countries benefit from tourism development (Scheyvens 2011; Pleumarom

2012). The tourism sector's claims regarding the creation of employment opportunities for poor people are challenged by Croes and Rivera (2015) who suggest that during periods of economic growth the poor benefit the least and their jobs are the most vulnerable during periods of economic contraction. Pleumarom (2012) puts forward the argument that rather than providing poverty reducing employment, tourism jobs in developing economies are insecure, low paid and have high staff turnover. Her research also addresses the issue of financial leakages of income and profits which do not accrue to local communities as a result of high levels of imports and repatriation of profits by foreign-owned tourism companies. Lemma (2014) lists a number of factors which can act as barriers to poor households' ability to participate in the tourism industry. These barriers can be summarised as limited government support, limited human capital, lack of finance, limited organisational strength and gender norms and constraints.

1.3 The Concept of Pro-Poor Tourism

It is useful to discuss the concept of pro-poor tourism and its evolution in order to understand its significance within the context of this research. An analysis of critiques of pro-poor tourism may be found in the review of literature (Chapter 2). The Millennium Development Goals (MDGs) provided a new focus on poverty reduction strategies and were the impetus for a range of pro-poor tourism initiatives and the tourism poverty alleviation nexus gained increased attention (Scheyvens, 2007; Duttagupta 2012). However, contemporary approaches to pro-poor growth evolved from the *trickle-down approach* of the 1950s post war development theories which centred on notion of a vertical flow of economic gains to poor households (Kakwani and Pernia 2000). The concept of pro-poor tourism emerged from concerns by the Department for International

Development (DFID) and non-governmental organisations (NGOs) in the United Kingdom, that tourism initiatives sponsored by governments and donors were focused on macro-economic growth with little regard to the needs of the poor.

The Pro-Poor Tourism Partnership (PPTP) comprising the Centre for Responsible Tourism (CRT), the International Institute for Environment and Development (IIED) and the Overseas Development Institute (ODI) was charged with the responsibility for the promotion and facilitation of tourism initiatives to benefit poor communities (Akrong 2019). The strategies formulated by the PPTP can be categorised under three headings. The first strategy focuses on increasing economic impacts through expansion of employment, enterprise and collective income sources. The second strategy relates to improvement of non-financial livelihood impacts including capacity building, skills development and local access to infrastructure. Facilitating participation by the poor in decision making structures which impact their livelihoods is the basis of the third strategy (PPTP 2004; Akrong 2019).

Proponents of pro-poor tourism assert that it is not a theory in itself and it does not ally itself with any particular theories or movements (Harrison 2008). The defining criterion of pro-poor tourism is the emphasis on the necessity for the poor to receive net benefits from participation in tourism. Consequently, pro-poor tourism practitioners argue that it applies to small scale as well as mass tourism (Ashley et al. 2001). Although it has aspects in common with other approaches to tourism including community-based tourism, sustainable tourism and ecotourism (Ashley et al. 2001) note that the fundamental drivers of pro-poor tourism are quite distinct as they focus on strategies to provide benefits for the poor at every stage of the tourism value chain. It is argued that as concepts such as eco-tourism and community-based tourism focus on protecting the

environment and culture of the destinations but do not proactively address poverty alleviation (Ashley et al. 2007). Goodwin (2008) indicates that in the context of discussions about the impact of eco-tourism and community-based tourism there has been little evidence of the net benefits to local communities. Analysis of publications by the PPTP, DFID and ODI makes it possible to identify the key characteristics of pro-poor tourism. Harrison (2008) compares pro-poor tourism to the fair-trade movement in the sense that it constitutes a form of market intervention by influencing the demand for tourism products and services provided by the poor. Pro-poor tourism works within the context of market forces and it is concerned less with the relative benefits than the absolute benefits received by the poor. Consequently, implicit in pro-poor tourism is the acceptance that the non-poor may benefit, perhaps disproportionately, from tourism (Harrison 2008). Pro-poor tourism does not focus on redistribution of wealth and consequently, tourism is classed as pro-poor even if rich households benefit disproportionately more than poor households so long as there are net benefits for the poor (Ashley et al. 2001).

1.4 Research Location

The key reason for the choice of Cox's Bazar as the location for this research was due to its status as Bangladesh's most popular tourism destination. It has been described as the country's capital of tourism (Mamun et al. 2013) and as the tourist hub of Bangladesh (Roy and Roy 2015). The main attraction of the destination is the world's longest unbroken sandy beach. This research was conducted in the three most frequented tourist spots in the resort namely Kolatoli, Suganda and Laboni beaches. Cox's Bazar is also a gateway for excursions to a wide range of tourism sites including Aggameda Khyang Buddhist monastery, Himchari National Park and St Martin's coral island.

Although the resort attracts visitors throughout the year, the peak season is from November to March. Precise statistical data relating to tourism numbers in Bangladesh is difficult to obtain (Lemma 2014), however it has been calculated that Cox's Bazar caters for up to two million people annually in the peak season (Ahammed 2010). There is also a lack of reliable data relating to the number of tourism related businesses in the resort, however research (Mamun et al. 2013) indicates that there are approximately 220 hotels and guest houses, 154 tourist restaurants and 54 tour operators. The same research estimated the number of people employed in the tourism sector as 10'000 including construction and maintenance workers. The vast majority of tourists in Cox's Bazar are domestic tourists and travel from all regions of Bangladesh (Ahammed 2010; Roy and Roy 2015). The overall poverty headcount ratio is 26.1 and the extreme poverty headcount ratio is 12.2 (World Bank 2019). Cox's Bazar was chosen as the research location due to the size of the tourism sector, the cross section of tourists who visit the resort and the number of poor households in the vicinity of the destination.

1.5 Rationale and Significance of the Research

There has been extensive research into the relationship between tourism and poverty alleviation in developing countries. (Hall 2000; Ashley 2003; Jamieson et al. 2004; Harrison 2007; Meyer 2007; Blake 2008; Mitchell and Ashley 2009; Scheyvens 2011; Islam and Carlsen 2012; Croes 2014; Venegas et al. 2015). However, an analysis of the literature on pro-poor tourism (Truong cited by Mao 2015) indicates a focus on Africa and a relative lack of research in South Asia. Specifically, there has been relatively little research conducted in the context of the tourism sector in Bangladesh (Hassan and Burns 2014). There is literature focusing on the viability of pro-poor environmental tourism and the rationale for

diversification of exports in the context of the Bangladeshi tourism industry (Honeck and Akhtar 2014; Amin 2017). However, there is a lack of current literature which examines the impact of tourism on poverty alleviation in Bangladesh based on value chain analysis. However, research into poverty reduction has been conducted using value chain analysis in Malaysia and Cambodia (Halim 2014; Mao 2015). There is a considerable body of literature relating to the positive impact of tourism on economies at a national and local level (Bull 1991; Lundberg et al.1995). These studies tend to focus on the impact of tourism expenditure in relation to output or sales, wages from tourism jobs and employment generation in the sector. However, there is little literature specifically on the contribution of tourism expenditure to poor households in the context of poverty alleviation in an economy such as Bangladesh in which tourism constitutes a small part of Gross Domestic Product (GDP).

The majority of research exploring the impact of tourism on poverty alleviation is predominantly based on the impact of international tourism and does not include domestic tourism (Ghimire 2001; Scheyvens 2007; Njoya and Seetaram 2018). However, there is research (Saayman et al, 2000; Meyer and Meyer 2015) which argues that domestic tourism has potentially higher levels of linkages with the local economy and more benefits for poor households. Much of the research which employs value chain analysis of tourism in developing economies tends to focus on the linkages between agriculture and the accommodation sector of the tourism value chain (Pratt et al. 2018). This research provides a wider lens incorporating domestic and international tourists, poor and non-poor households and twelve business actors in the tourism value chain in Cox's Bazar including those in the formal and informal economy.

1.6 Research Aim

The aim of this research is to examine the contribution of expenditure in the tourism value chain to poor households and to analyse the prospects of pro-poor tourism in the resort of Cox's Bazar. The research focuses on mapping actors in the tourism value chain to identify linkages to the local economy and the net contribution to households. To address this question, the research employs quantitative methods to measure the direct and indirect contribution to the incomes of poor households. This research focuses on the tourism value chain in Cox's Bazar to analyse the impact of tourism expenditure and the level of contribution of tourism spending to incomes of poor households.

1.7 Research Objectives

In order to achieve the research aim, four objectives have been formulated. These research objectives are specified below;

Objective 1: To map the key actors in the tourism value chain and measure the direct and indirect contribution of tourists' expenditure to poor households' incomes in Cox's Bazar.

Objective 2: To identify linkages and leakages in the tourism value chain in Cox's Bazar.

Objective 3: To evaluate if tourism in Cox's Bazar contributes to poverty alleviation in Cox's Bazar.

Objective 4: To identify barriers to the development of a pro-poor tourism value chain in Cox's Bazar.

1.8 Research Questions

Seven research questions have been developed to contribute to the achievement of the above objectives.

Question 1: Are there variations in the levels of contributions to poor households' incomes from different segments of the tourism market in Cox's Bazar?

Question 2: To what extent are there variations in the level of direct and indirect contribution to poor households' incomes from tourism value chain actors in Cox's Bazar?

Question 3: To what extent is there evidence of linkages to the local economy by actors in the tourism value chain?

Question 4: To what extent is there evidence of leakages from the local economy by actors in the tourism value chain?

Question 5: To what extent do tourism related occupations contribute to poor households' incomes?

Question 6: How inclusive, in terms of gender participation is the tourism value chain in Cox's Bazar?

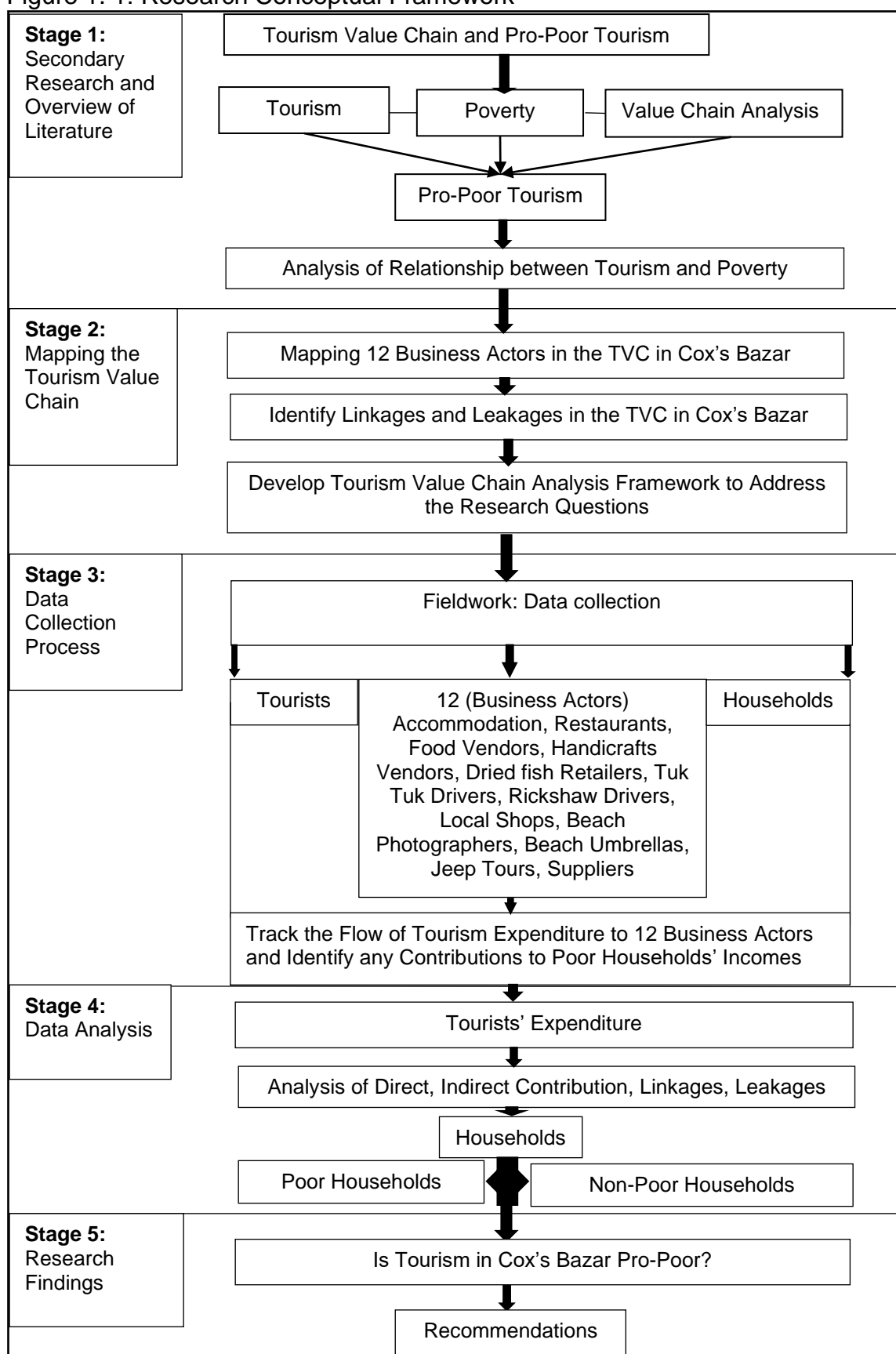
Question 7: To what extent is the tourism value chain in Cox's Bazar pro-poor?

1.9 Research Framework

The development of a conceptual framework for this research is based on principles of pro-poor tourism and the application of tourism value chain analysis. The diagram presented in Figure 1.1 illustrates a five-stage framework which underpins this research. The first stage draws on a review of literature concerning the relationship between tourism and poverty alleviation and the application of value chain analysis in the context of tourism. The second stage

of the framework involves mapping the tourism value chain in Cox's Bazar. This process identifies twelve business actors within the tourism value chain and examines the relationship between these actors and local suppliers. The third stage focuses on the data collection process using structured questionnaires to gather quantitative data relating to the flow of tourists' spending to different actors in the tourism value chain. In addition, data is gathered relating to the proportion of tourists' spending which contributes to poor households' income. Stage four of the framework involves analysis of data gathered during the fieldwork research in order to measure the direct and indirect contribution of tourism expenditure to poor households' incomes. The final stage of the research framework reviews the findings from the previous stages to identify the extent to which tourism in Cox's Bazar results can be classified as pro-poor and to make recommendations to increase net benefits from tourism for poor households' incomes.

Figure 1. 1: Research Conceptual Framework



Source: Author's Own Work 2019

1.10 Thesis Structure

The structure of the thesis is outlined below in the form of seven chapter titles followed by a synopsis of each chapter.

Chapter 1: Introduction to the Research

In this chapter the background to the research is presented. The rationale and significance of the research is outlined. The evolution of the concept of pro-poor tourism is presented and its key characteristics are discussed. The reason for the selection of the resort of Cox's Bazar as the research location is explained. Four research objectives and corresponding seven research questions are stated. The conceptual framework for addressing the research objectives is illustrated and the structure of the thesis is presented.

Chapter 2: Literature Review

The literature review explores the relationship between tourism, economic growth and poverty alleviation. There is an analysis of the research relating to the specific characteristics of tourism as an industry and the consequent potential impact on poor households. Much of the literature in this field is based on international tourists visiting developing countries with a focus on the formal economy. In this review of literature, the importance of domestic tourism incorporating Gladstone's (2005) typology of tourism and employment in the informal economy in developing countries is addressed. Research relating to tourism and economic growth is analysed. Issues associated with the conceptualisation of poverty and different poverty measurement methods are identified. The review of literature also incorporates an analysis of the relationship between tourism and poverty alleviation. The evolution of value chain analysis and its application in the context of tourism and poverty reduction

is discussed including the concept of linkages and leakages in the tourism value chain. A review of literature which critiques the concept of pro-poor tourism is presented and there is analysis of literature relating to the different ideological and practical perspectives underpinning pro-poor tourism and community-based tourism.

Chapter 3: Economy, Tourism and Poverty in Bangladesh-Cox's Bazar

This chapter examines the wider context of the Bangladeshi economy and its progress in the area of poverty reduction. The chapter addresses four main themes. Firstly, there is an overview of the economy incorporating demographic profiles, economic investment, foreign direct investment and government economic development strategy. The second section outlines the structure of the tourism industry in Bangladesh. Government tourism development strategy at a national level in Bangladesh is examined and its relationship with wider industrial development policy is analysed. Gender participation in the labour market is also discussed. Thirdly there is a review of progress in Bangladesh on poverty reduction in the context of the Millennium Development Goals (MDGs) and the impact of a range of poverty alleviation programmes. The final section focuses on the economy, tourism, and poverty in Cox's Bazar with an overview of tourism infrastructure in the region and an analysis of poverty indicators.

Chapter 4: Research Design, Methodology and Methods

The methodology and methods upon which this research is based are outlined in this chapter. The research philosophy and approaches underpinning the dissertation are presented. The rationale for the selection of a value chain analysis approach as a research method is outlined. There is a description of the research methods including details relating to data collection techniques

and the structure and content of questionnaires employed in the field research. Sampling techniques are described, and information is provided about sample sizes. Practical challenges and limitations associated with this research are discussed along with details of ethical issues.

Chapter 5: Mapping the Tourism Value Chain in Cox's Bazar

The research findings are categorised under three main headings (i) tourists (ii) suppliers and (iii) business actors in the tourism value chain. The first category incorporates data about tourists in the research relating to type of tourist, expenditure patterns and contribution to the poor households via direct and indirect contributions. In the second part a supply chain mapping framework is illustrated. The scope of data relates to business size, monthly income and expenditure of the business actors and direct and indirect contribution to local households. The third part of this chapter presents data relating to five cohorts of business actors in the formal and informal sectors. This chapter presents a value chain mapping framework for each of the actors incorporating linkages and leakages. The chapter concludes with an overall value chain mapping framework incorporating all actors and their contribution to poor households' income.

Chapter 6: Tourism Value Chain and Poverty Reduction

Profiles of households in the research sample including data relating to household composition, expenditure, size, ethnicity, and occupation in relation to poverty head count ratio are presented in this chapter. In addition, poverty headcount ratios are calculated for households with members employed in the tourism sector and those employed in non -tourism related occupations. Based on the categorisation of tourists conducted in chapter 5, there is an analysis of

expenditure patterns and contribution to poor households' incomes. A comparative analysis is also presented in relation to the domestic, diaspora and foreign tourists' contribution to poor households' incomes. The chapter concludes with an examination of the gross and net contribution to poor households' incomes by actors in the Cox's Bazar tourism value chain.

Chapter 7: Discussion and Recommendations

The final part of the thesis consists of discussion and recommendations based on the findings contained in the previous chapters. The framework for this discussion comprises three sections based on the conceptual research framework. Discussion concerning analysis of data relating to tourists is followed by a discussion based on the findings identified from the twelve business actors categorised into five cohorts. The third section consists of a discussion based on research findings from households in the study area. The research objectives and research questions identified in the introduction to this thesis are addressed in this chapter. The scope of the recommendations includes proposals relating to tourists, business actors in the tourism value chain and households. In addition, wider recommendations resulting from the research relating to tourism and poverty alleviation strategies in Bangladesh at a local and national level are proposed. The limitations of this study are outlined. The significance of the research and its contribution to knowledge is proposed in the context of (i) development of a comprehensive model for tourism value chain mapping incorporating different tourism segments, actors in the formal as well as informal economy and poor households and (ii) measuring the contribution of domestic tourists' expenditure to poor households' incomes. Areas for further research are suggested and the conclusions drawn from the research are stated.

1.11 Chapter Summary

This introductory chapter outlined the background to the research and specified the research aims and objectives. An overview of tourism's potential impact on poverty alleviation due to the industry's high levels of backward linkages and labour market intensity was proposed. The evolution of pro-poor tourism and the characteristics associated with this concept was outlined. The five-stage research conceptual framework which forms the basis of this research was presented. This chapter highlights the limited amount of research relating to tourism and poverty reduction in Bangladesh, specifically incorporating a value chain analysis approach. The following chapter comprises the first stage of the research conceptual framework by reviewing literature relating to the inter-related concepts of tourism, poverty alleviation and value chain analysis in the context of pro-poor tourism.

CHAPTER 2: LITERATURE REVIEW

2.1 Introduction

In this chapter there is a review of literature relating to the concepts of tourism and poverty and approaches to the measurement and reduction of poverty in developing economies. There is an analysis of divergent research findings relating to the impact of tourism on both economic growth and poverty alleviation in a range of countries. An examination is conducted of literature relating to the evolution of the understanding of the concept of poverty and approaches to the measurement of poverty. The review offers perspectives on the unique characteristics of tourism as an industry and the resultant approaches to analysing a complex and fragmented tourism value chain (Sharpley 2014; Cooper et al. 2018) and its impact on poverty alleviation. The concepts of value chain analysis, linkages and leakages are investigated and the application of these concepts to tourism and poverty alleviation strategies is examined.

This research aims to contribute to knowledge in the field by integrating (i) domestic as well as inbound tourists and (ii) actors in the formal and informal economies in the scope of the tourism value chain analysis. Consequently, literature relating to two key characteristics of the tourism value chain in developing countries is examined – the under-researched topic of the growing importance of domestic tourism and the role of employment in the informal labour market. The section concludes with a review of literature relating to critiques of the concept pro-poor tourism including its relationship to community-based tourism.

2.2 Tourism and Economic Growth

Tourism is perceived by many emerging economies as a catalyst for economic growth due to the industry's perceived ability to create employment, attract overseas investment and increase foreign exchange earnings (Torres and Momsen 2004). Jamieson et al. (2004) observe that the development of the tourism sector in many developing countries is prioritised because of its potential for generating employment due to its labour intensive nature. There is considerable research relating to the impact of tourism on economic growth. Although some results (Figini and Vici 2010; Chou 2013) indicate a negative impact, there is evidence of a positive impact of tourism on economic growth in a wide range of countries (Shan and Wilson 2001; Durbarry 2002; Eugenio-Martin et al. 2004; Fayissa et al. 2008; Castro-Nuno et al. 2013; Cardenas-Garcia et al. 2015; Chiu and Yeh 2017). Advocates of tourism claim that the industry is a key driver for economic growth on a global scale creating employment opportunities and significantly contributing to GDP (UNWTO 2020; WTTC 2020). Honey and Gilpin (2009) are among those who describe the impact of tourism in terms of a snowball effect on economic growth, generating investment by new businesses in a range of sectors. Khalil et al. (2007) examined the impact of tourism on the economy in Pakistan using the Granger Causality Test and concluded that there was evidence of co-integration between tourism and economic growth. The Turkish economy was the subject of Zortuk's (2009) research which indicated that there was a causal relationship between tourism and economic growth. Balaguer and Cantavella-Jordá (2002) examined the tourism led growth hypothesis in Spain and concluded that the Spanish economy was positively impacted by expansion of international tourism and that there was evidence of multiplier effects. The World Bank (2017)

asserts that tourism also has the capacity to facilitate spillovers into merchandise exporting sectors and provides opportunities for exporters to gain information about international demand and raise awareness of their products and services. There is research which posits that tourism has the effect of stimulating an increase in the activities of related industries (Spurr 2009 cited by Brida and Giuliani 2013). These links can be with formal sectors of the economy, typically agriculture, construction and transport and informal sectors such as handicrafts and cultural activities.

However, there is a body of research which casts doubt on the claims of tourism to be an engine of economic growth. Parnwell (2001) notes that tourism in Asian countries often provides economic benefits to limited sections of society whilst little attention is paid to the impact on destination communities. Adams and Parmenter's (1995) study into the relationship between the tourism sector and other industries in the Australian economy indicated that other export – led sectors can be adversely impacted by growth in tourism. In the context of sub-Saharan Africa, Chen and Devereux (1999) conducted research indicating that tourism may have a welfare reduction effect for trade regimes which depend on export taxes or import subsidies. Their research also demonstrated that although foreign direct investment (FDI) in the form of tourism is mostly beneficial, economic impoverishment is a possible result of the growth of tourism.

Research indicates that linkages between the agriculture sector and the tourism sector often fail to maximise the potential beneficial effects for local food producers. A study in the Mexican resort of Cancun (Torres 2004 cited by Scheyvens and Russell 2012) demonstrated that hotels only sourced 3.4 per

cent of vegetables from local growers and 4.5 per cent of fruit. Desforges (2000) provides an example of the tourism industry in Peru in the 1990s. During that decade there was a 300 per cent increase in tourist numbers, and there is little evidence to indicate that this resulted in any alleviation of poverty. However, there was a contraction in the size of the export-led agricultural industry. The relationship between the impact of the tourism industry on other industries is the subject of some analysis (Blake 2008). It is argued that the tourism industry has the potential to generate real exchange rate appreciation and that the extent to which the poor benefit from tourism is based on their level of involvement in other export sectors (Copeland 1991; Adams and Parmenter 1995 cited by Blake 2008). This has particular resonance in a nation like Bangladesh where non-tourism industries such as garment manufacturing and food exporting would potentially be negatively impacted by real exchange rate appreciation which can result in a contraction in other export-led industries.

2.3 Tourism and Poverty Alleviation

There is significant literature relating to the impact of tourism on economic growth, however, the need for more quantitative evidence to determine the relationship between tourism and poverty reduction is highlighted by several researchers (Winters et al. 2013; Kinyondo and Pelizzo 2015; Garza-Rodriguez 2019; Tan and Morimoto 2019). Many developing economies perceive the tourism industry as a means of alleviating poverty (Buckley 1996). Consequently, tourism marketing and planning are not only seen in terms of commercial potential but also as important elements of societal planning and development (Sautter and Leisen 1999). Ashley (1997) notes the potential of tourism to generate complementary income and that tourism is easier to integrate into agricultural livelihoods than other industries. Ashley's (2003)

research on the tourism sector in Namibia emphasises the capacity of the industry to generate different streams of income for poor rural households. These income streams can be classified under four headings (i) salaries for part time and full-time employment (ii) casual income from the informal economy (iii) revenue from ownership of tourism business and (iv) collective income generated for the community as a whole through taxes and levies. UNWTO (2020) emphasises the positive impact of tourism on poverty focusing on the labour intensive nature of the industry which facilitates participation by poor people in the workforce. Many of the jobs require relatively low level of skills and education and are part time in nature which means they can complement other livelihoods. Ashley and Roe (2002) argue that the development of the tourist industry is congruent with the concept of pro-poor growth because tourism tends to be labour intensive and it frequently provides opportunities for women's participation in the labour market. Venegas et al. (2015) analyse the relationship between extreme poverty reduction and the agricultural, manufacturing and tourism sectors and find that tourism's rate of poverty reduction was statistically significantly greater than that of agriculture in Costa Rica and Nicaragua. Croes' (2014) research indicates a causal relation between tourism development and economic expansion, and between tourism and poverty reduction, and a bidirectional causal relation between economic expansion and poverty.

UNWTO (2010) takes an explicitly neo-liberal approach stating that tourist host countries are net beneficiaries in terms of balance of payments and that multinational tourism operators benefit from easier access to foreign markets. However, there is a range of literature (Gartner and Cukier 2012; Saayman et al. 2012; Saarinen and Rogerson 2014) which questions the positive impact of

tourism on poverty reduction and asserts that tourism-led development tends to create dependency, economic inequalities and revenue leakages. The question of the value of absolute growth versus equitable growth is the subject of extensive debate. It is argued that economic growth by itself is not a sufficient catalyst for poverty alleviation without structural changes which benefit poor households (Buckley and Casale 2006). Ashley et al. (2000) put forward the view that tourism can be harnessed to benefit the poor in developing countries. However, research (Blake et al. 2008; Croes 2014; Medina-Munoz and Gutiérrez-Pérez 2015) indicates that in many developing economies a direct correlation between the increase in tourism revenue and the reduction in poverty headcounts cannot be identified. Chok et al. (2007) highlight the lack of empirical evidence to indicate that tourism benefits the economically marginalised. Pluss and Backes (2002) conducted analysis which indicates that tourism has failed to alleviate poverty in ten of the thirteen nations which contain eighty per cent of the world's population.

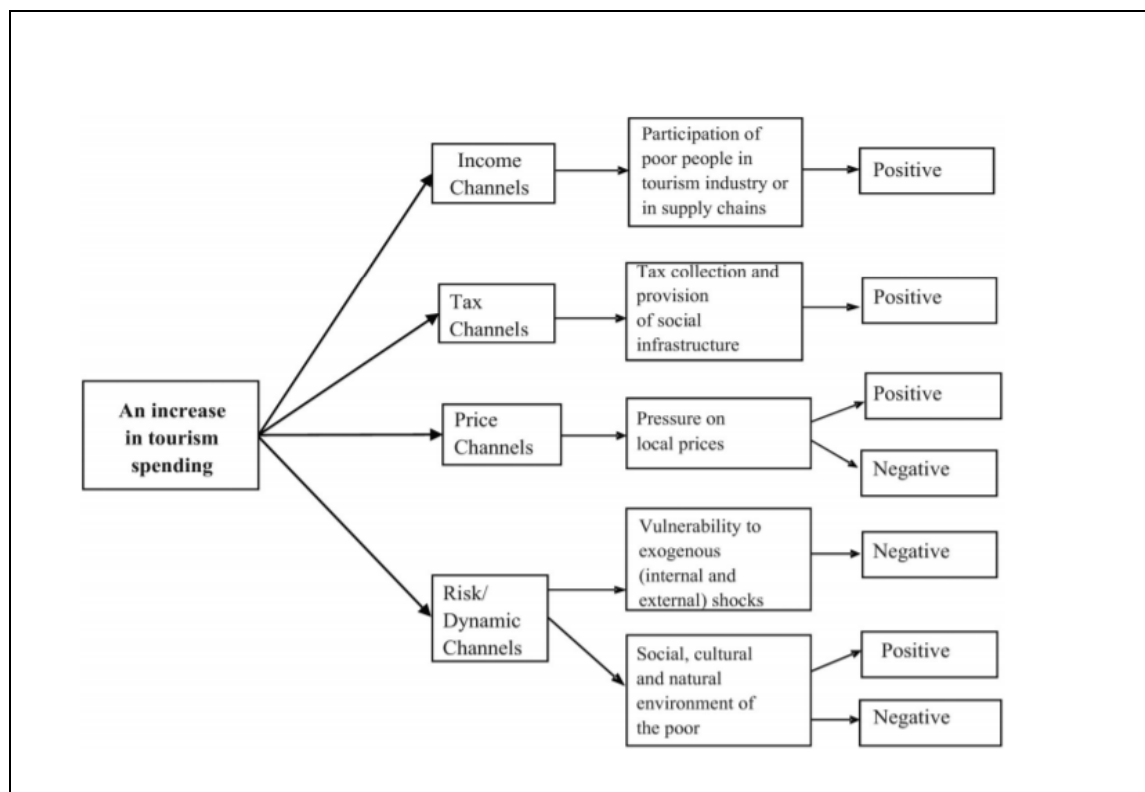
It is claimed by some writers that tourism may exacerbate social inequality (Cleverdon and Kalisch 2000). Pleumarom (2007) argues that much of the employment in the tourism sector is poorly paid, seasonal, part time, and uncertain and there are few prospects for career progression. Research by Blake et al. (2008) into tourism and poverty in Brazil indicated mixed results with evidence that tourism benefited low-income households but also that the lowest income households receive relatively little benefit from tourism. Schilcher (2007) is critical of UNWTO for integrating its strategy for poverty alleviation with trade liberalisation. The neoliberalism approach it is argued, discourages government interventions of a redistributive nature and consequently serves to institutionalise inequality and poverty among the poorest in society. Research

into the tourism sector in Malawi (Gartner and Cukier 2011) did not establish evidence of a direct link between participation in tourism employment and poverty reduction at the household level and concluded that there was a potential for tourism to perpetuate or exacerbate poverty. Gooroochurn and Blake (2005) examine the conditions under which tourism can be immiserizing using a case study of Mauritius. Their findings indicate that the main conditions for lower welfare are monopoly power in the non-traded sector, foreign ownership of resources, distortions in trade taxes, increasing returns to scale and income distribution. Research in Nicaragua and Costa Rica (Croes 2014) suggests that tourism positively impacts the poor at the lower levels of economic development, but it does not have a systematic effect. Croes (2014) found that tourism could be classified as pro-poor in Nicaragua but that this did not apply in Costa Rica.

Research by Mahadevan et al. (2016) into the impact of tourism-led growth on poor households' incomes in Indonesia indicates that an increase in visitors results in a reduction in poverty at an aggregate level. However, the decreases in the incidence of poverty were accompanied by a rise in income inequality. It is worth noting that Mahadevan et al.'s (2016) study is one of the few in this field which examines differences in impact of expenditure between foreign and domestic tourists. Their findings demonstrate that inbound tourism contributed to a greater decrease in poverty, but it is also related with a higher level of income inequality compared with domestic tourism. Garza-Rodriguez's (2019) research indicates a long-term relationship between international tourism and poverty reduction in Mexico during the timespan 1980 to 2017. Njoya and Seetaram (2018) take a macroeconomic approach to explain the mechanism through which between tourism can lead to poverty reduction Their research

examines the effects of inbound tourism on poverty reduction in Kenya using a dynamic Computable General Equilibrium (GCE) model. They put forward a conceptual framework (figure 2.1) illustrating four channels (Blake 2008) through which tourism expenditure impacts on poverty namely income, tax, price, and risk channels. The first two channels are judged as having a positive contribution to poor households through provision of income generation opportunities and development or enhancement of the social infrastructure. The effects on the poor of the latter two channels are potentially both positive and negative due to the pressure on local prices of tourism related goods and services and the dynamic impact of tourism on local economic development respectively.

Figure 2. 1:Tourism and Poverty Reduction



Source: Njoya and Seetaram 2018

Rather than solely employing the more commonly used headcount indices, Njoya and Seetaram's (2018) research incorporates the multidimensional

Foster-Greer-Thorbecke (FGT) index (1984), combining headcount index, income gap and poverty severity indices. Their findings indicate that over a twelve-year timeframe from 2003 to 2015, the effect in relation to reduction of poverty headcount is very limited. However, the data related to poverty gap and poverty severity indices point to more significant poverty reductions in both rural and urban households (with greater impact in the urban households) and to the conclusion that tourism in Kenya may be classified as pro-poor. Mahadevan and Suardi's (2017) research also indicates that the poverty measure employed has an impact on the evaluation of the impact of tourism on poverty reduction. Based on panel evidence from 13 tourism intensive economies from 1995-2012, results using the poverty headcount measure indicate limited evidence of a reduction in poverty headcount. However, analysis of results using the poverty gap measure indicates a significant reduction in the minimum cost of lifting poor households out of poverty.

2.4 Conceptualisation and Measurement of Poverty

Although poverty reduction is a key goal of stakeholders engaged in developing economies, there are disparities in understanding of what is meant by the term *poverty* (Shildrick and Rucell 2015; Winter 2019). Townsend (2006) traces the evolution of the definition of poverty since the 1880s in terms of three alternative concepts which are (i) subsistence, (ii) basic needs and (iii) relative deprivation. The United Nations Development Programme (UNDP 1997) defines poverty in the context of three broad typologies (i) absolute and relative poverty (ii) ultra-poverty and (iii) transient and chronic poverty. Absolute poverty refers to an absolute minimum standard below which one is classed as "poor". Relative poverty refers to a standard which is related to the society in which an individual

life. Ultra-poverty relates to food consumption, specifically a poor household is defined as one which cannot provide 80 per cent of minimum calorific requirements as specified by the World Health Organisation (WHO 2005). Transient poverty is short term in nature and may be cyclical while chronic poverty is long term and may be related to structural and systemic factors.

The World Bank (2000) defines poverty as 'pronounced deprivation in well-being'. This leads to the question of what is meant by the term 'well-being'. Wellbeing is conventionally perceived in terms of an individual or a community's command over commodities and consequently the poor are defined as those who do not have sufficient income in relation to a defined minimum threshold. Consumption may be viewed in monetary terms or poverty can be related to a particular type of consumption e.g., food, health, education or housing. The term could refer to access to resources in terms of income or consumption. Alternatively, it could refer to a much broader definition (Sen 1987) which embraces health, education, political rights, and the overall level of ability to function in society. Sen's concept of poverty has had significant influence in development studies (Croes, 2012; Robeyns 2017). However, Robeyns (2017) notes that Sen's capability approach does not set out to explain poverty and inequality but focuses on conceptualising these notions. The theoretical framework underpinning the capability approach has influenced development studies (Croes 2012; Winter 2019). The approach has been criticised for ambiguities in terms of conceptual framework and its practical application due to the complexity and amount of data required (Alkire 2002; Chiappero-Martinetti 2010; Lelli 2010).

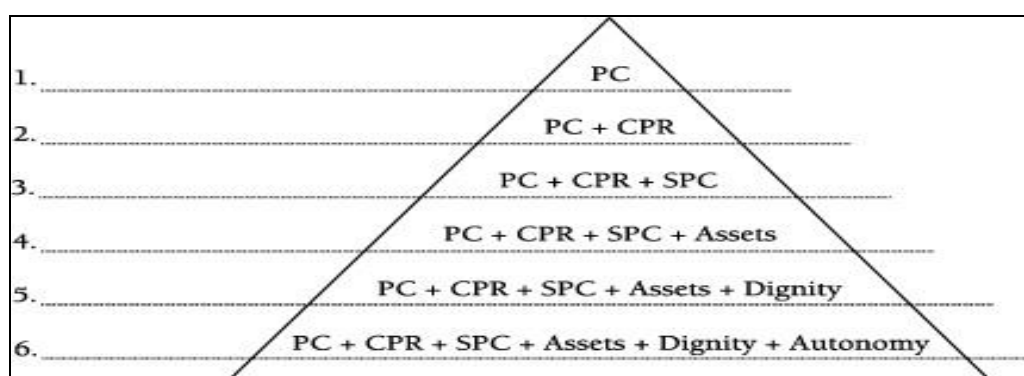
Laderchi et al. (2003) indicate that a commonly used definition of poverty is the monetarist approach. In this approach, the term *poverty line* is frequently used

to describe the minimum level of income or consumption necessary to meet basic needs. However, there is criticism that such an approach fails to define poverty as a multidimensional concept incorporating not only lack of adequate income but also vulnerability and lack of representation and power (Zhao and Ritchie 2008). Sultana (2002) provides a definition of poverty which is more wide-ranging incorporating vulnerability, isolation, powerlessness, dignity and self-respect. Criticism of the use of subsistence to define poverty is voiced because it concentrates on physical needs and ignores social needs. Townsend (2006) notes that in an increasingly globalised and interconnected world, it is insufficient to see poverty solely in terms of low income relative to others. This approach it is argued, fails to distinguish between inequality and poverty.

The relative deprivation concept approaches poverty in terms of lack of resources to observe social demands and customs. Consequently, poverty lines vary from country to country based on economic and social factors within each country. However, in order to measure and compare poverty on an international level, it is deemed necessary to have a universally agreed poverty line expressed in a common unit (Ravallion et al. 2009). The World Bank (2011) uses the figure of USD 1.90 per day based on Purchasing Power Parity (PPP) for the purposes of global comparisons. PPP is a means of exchange rate determination which posits that the exchange rate of currencies is determined by the relative price levels in different countries (Dornbusch 1985). However, Deaton (2010) challenges the appropriateness of PPP in poverty measurement and argues that PPP indices need to be reweighted to reflect local poverty measures and to exclude luxury items. Chambers (2002) notes that the most widely used definitions of poverty have been formulated by 'non-poor' development professionals with little input by poor people. Consequently, he

suggests that definitions such as those which inform the Millennium Development Goals (MDGs) are too narrow in their focus and proposes a terminology of ill-being and wellbeing rather than just poverty. The expansion of the definition of poverty is illustrated in the pyramid of poverty concepts (Baulch 1996) reproduced below.

Figure 2. 2: Pyramid of Poverty Concepts



Source: Baulch 1996

It is noted that PC= Private Consumption, CPR=Common Property Resources, SPC= State Provided Commodities. This diagram demonstrates the development of the understanding of poverty from the economic or monetarist focus on consumption to a more holistic approach incorporating less quantifiable criteria such as dignity and autonomy as proposed by Sen (1999). In the monetarist approach poverty is defined in terms of consumption or income levels (Laderchi et al. 2003). If a person or a community falls below a certain limit which is judged necessary to meet basic material needs, then they are considered to be in poverty. However, Townsend (2006) notes that material needs are subject to change and are in many cases socially determined. In the 1970s an extension of the subsistence model was promoted by organisations such as the International Labour Organisation (ILO). This approach is termed

the basic needs concept and incorporates the material needs of the subsistence definition. However, in addition to the material needs of an individual or a family unit, it also focuses on services by communities such as sanitation and healthcare. Relative deprivation emerged as a formulation of the definition of poverty in the latter part of the twentieth century. Chambers (2002) emphasises an approach to defining poverty using clusters of meaning rather than single definitions. Chambers (2002) cites three examples such as the widely used concept of income poverty or consumption poverty which is quantifiable and measurable. The second cluster relates to material lack which may be lack of money, shelter, land or lack of access to services such as education or healthcare. The third cluster is described as capability deprivation and includes skills and physical abilities. A further cluster is based on a multidimensional approach.

The Millennium Development Goals (MDGs) with their declared aim to reduce extreme poverty refocused attention on what precisely is meant by poverty. The success of the MDGs in facilitating poverty reduction is the subject of debate ranging from 'respectable progress' (Vandemoortele 2018) to 'ambivalent' impact (Saarinen and Rogerson 2014). It is argued that a reason for the failure of MDGs to achieve all their targets was a lack of critical awareness of the structural factors underpinning poverty and the relationship between neoliberal economic policies and poverty in developing countries (Bello 2015; Mc Closkey 2015). The MDGs were superseded by Agenda 2030 or the Sustainable Development Goals (SDGs) in 2012 where poverty is perceived as one of several global issues to be addressed. It could be argued that this change in emphasis could lessen the focus on the primacy of poverty alleviation. However, a counterargument is that SDGs address poverty reduction from a

more integrated perspective encompassing social economic and ecological dimensions (Loewe 2015). Scheyvens and Hughes (2019) challenge the notion inherent in the SDGs that the tourism industry is a tool for poverty reduction and note that expectations may be unrealistic unless innovative strategies are developed which go further than simply lessening the symptoms of poverty.

2.5 Methods of Measuring Poverty

Definitions of poverty impact on strategies to measure and reduce poverty (Laderchi et al. 2003). The way in which we measure poverty can impact on the understanding and analysis of it and on the development of alleviation strategies (Alkire and Foster 2011). Consequently, methodologies for the measurement of poverty are of significance. Having outlined the complexity and diversity associated with the definition of poverty, it follows that attempts to measure poverty also incorporate a wide range of methods and conceptual approaches. The poverty line measurement is recognised as a crude indicator. It is acknowledged by the World Bank (2014) that poverty measurement criteria need to be more comprehensive and sophisticated incorporating dimensions of poverty which are not solely based on income or consumption indicators. These criteria include health, education and access to social capital. There is also recognition that a multi-dimensional approach to measurement of poverty may be more appropriate than a single index. There are significant differences in approach between three measurement indices frequently cited in the literature - the Human Poverty Index, the Multidimensional Poverty Index and Capability Difference.

The Human Poverty Index (HPI) is a composite index used by UNDP from 1997 to 2009 to measure poverty in developing economies and is comprised of three indicators. The first indicator is longevity measuring mortality. Measurement of

adult literacy rates makes up the second element and the third element relate to access to clean water and the percentage of children under weight. The Multidimensional Poverty Index (MPI) replaced the HPI in 2010 as a poverty measurement indicator by UNDP. It analyses data from household surveys and identifies overlapping deprivation across the same three dimensions as the HPI but MPI identifies multiple deprivations and the number of deprivations experienced by people at the same time.

Kakwani (2006) asserts that economic growth is not a valid measure of poverty alleviation and frames the concept of poverty in terms of capability deprivation which relates to the failure of socially determined basic capabilities caused by lack of resources. Foster and Sen (1997) cited by Alkaire (2006) describe approaches to the measurement of capability deprivation. Firstly, there is a multidimensional index such as HPI in which a poverty line is set for each aspect of the multiple dimensions of poverty. A second approach combines income measures informally with other measures. A third approach focuses on capabilities and sets income poverty lines with respect to these capabilities through equivalence scales.

2.6 Tourism Value Chain Characteristics and Poverty Alleviation

It is important to understand the unique characteristics of tourism in order to effectively analyse the value chain of 'a diffuse and multiple industry' (Hampton et al. 2017). In this section there is a discussion of literature relating to the specific characteristics of the tourism industry and the implications in terms of analysis of the value chain and its links with poverty alleviation. Tourism is a multifaceted concept which has social, economic, cultural and environmental aspects (Lew et al. 2004; Moufakkir and Kelly 2010; Sharpley 2014). The

complexity of tourism as an industry is reflected in the challenge involved in incorporating the characteristics of tourism in a single definition and the diverse range of interpretations of the concept of tourism (Jafari 1977; Smith 1989; Burns and Holden 1995; Judd 2006; Sharpley 2014). Some commentators (Morley 1992; Stabler et al. 2010) present tourism not as an industry in itself, even a fragmented one, but rather as a bundle of complementary goods and services or as a partial industry characterised by demand complementarities as opposed to the coordinated supply of similar or homogenous services. A number of factors are put forward to support the argument that the tourism industry is different from other export industries including the characterisation of tourism as an economic activity constituting an invisible export in which consumption and production occur simultaneously (Luvanga and Shitundu 2003; Richards 2007; Hoermann et al. 2010; Christian et al. 2011; Schulmeister 1979 in Song 2012).

In the context of value chain analysis, tourism's high level of inter sectoral linkages providing indirect benefits to a diverse range of actors in an extended value chain is widely cited as a particular characteristic of the industry which has potential impact on poverty reduction (Sharpley 1992; Telfer 2000; Goodwin and Bah 2003; Sofield et al. 2004; 2007; Mitchell and Page 2005; Sofield and Mactaggart 2005; Ashley et al. 2006; Meyer 2006; Mitchell 2006; McBain 2007; Spenceley and Meyer 2012). The fragmented nature of the tourism industry is comprehensively explored in the literature (Dredge 2006; Haugland et al, 2007; Wang and Fesenmaier 2007; Sharpley 2014; Cooper et al. 2018). There is criticism that approaches to tourism distribution have overwhelmingly been managerial and reductionist and fail to recognise the backward and forward linkages and the multiplicity of nodes and connections in the extended supply

chain (Sharpley 1992; Sofield et al. 2004; Sofield and Mactaggart 2005; Baggio 2007; Sofield et al. 2007; Jorgenson 2017).

An underestimation of the dispersed nature of activity and income channels in the tourism industry poses challenges for data collection and quantitative research into its impact on the local economy and poor households (Saayman et al. 2001). It is argued (Sofield and McTaggart 2005) that the conceptualisation of tourism in terms of a complex system facilitates a greater awareness of its potential contribution to poverty reduction. A range of literature (McIntosh and Goeldner 1986; Gunn 1988; Leiper 1990:2004; Mill and Morrison 1995:2012; Goeldner and Ritchie 2003 cited in Cooper et al. 2018) suggests that tourism can be most effectively understood through the lens of a systems approach. Jorgensen (2017) argues that the tourism system approach has merit in its ability to provide an overview but was never meant as an analysis tool. However, general systems theory was initially defined in terms of a set of elements which interrelate with each other and with the environment (Bertalanffy 1968; Weaver and Lawton 2006). The concept of a tourism system presented by Leiper (2004) incorporates a relatively simplistic model whereas Hall (2008) presents a more detailed system which includes geographical elements and tourism industry elements. The industry elements supply all the goods and services necessary to make the tourism experience and incorporate actors in the tourism value chain providing transport infrastructure, accommodation, retail and food service. Haugland et al. (2011) description of a tourism destination as a complex and fragmented network comprising a chain of actors with diverse goals resonates in terms of analysis of the tourism value chain in a destination in a developing economy such as Cox's Bazar. A system approach to tourism facilitates an understanding of the dynamic between the

tourism value chain and poor households (Sofield et al. 2004; Halim 2012). Consequently, literature relating to the specific characteristics and complexity of the tourism industry and a system approach to tourism has influenced this research in terms of development of the conceptual framework and the range and diversity of actors incorporated in the value chain mapping process including actors in the formal and informal labour market and poor households.

2.7 Tourism Value Chain Analysis and Poverty Alleviation

Value chain analysis is closely associated with pro-poor tourism (Rylance et al. 2009; Spencely et al. 2010; Mitchell 2012; Harrison et al. 2015; Sofield and Pratt 2015) and this research is based on a detailed analysis of expenditure in the tourism value chain and its contribution to pro-poor income. Pro-poor income is defined as 'wages and profits earned by poor households across all the interrelated strands of the value chain' (ODI 2019). Value chain analysis is employed because it provides a framework for demonstrating and quantifying a core proposition of pro-poor tourism which is that analysing tourists' expenditure patterns is important in measuring the contribution of tourism to poor households' incomes (Mitchell and Ashley 2010). Ndivo and Cantoni (2015) trace the theoretical roots of the value chain approach back seven decades from Hirschman's (1958) concept of backward and forward linkages in industry, and Porter's value chain model (1987) to the concept of global values and the impact on developing economies (Gereffi 2011).

Value chain analysis encompasses the full spectrum of activities involved in the production or delivery of goods or services from the planning stages to inward logistics and on to delivery to customers or end users and final disposal after use (Kaplinsky and Morris 2000). The concept of value chain was first proposed by Porter (1985) in his seminal work on competitive advantage in terms of a

collection of activities that are performed to design, produce, market and deliver products. Porter (1985) proposes that in order to identify areas of competitive advantage it is necessary to break down the firm into a series of activities and to then to analyse this series of activities. Porter (1985) distinguishes between primary activities and support activities. Porter's value chain illustrates a range of primary and support activities and serves as a tool to facilitate analysis. The concept of value chain has evolved into the concept of a value system. The term value system is not limited to an individual company. Rather, the value system approach places the individual company's activities in the context of a broader stream of activities. This broader context incorporates the activities by all those enterprises involved in the delivery of the product or service. The concept of value chain has evolved from the limitations of a single firm or company to incorporate more complex supply chains.

Increasing globalisation means that many of the agents in the supply main may be based in different countries. Gereffi and Korzeniewicz (1994) apply the concept of value chains to an analysis of globalization. This approach aims to analyse global income distributional patterns by mapping the activities along a chain and analysing linkages and leakages at each stage. The inclusion of the term chain indicates an emphasis on a vertical relationship between buyers and suppliers (Bolwig et al. 2010). The rise of globalisation has meant that value chain analysis is increasingly seen by researchers as a useful tool for analysing interlinkages in economic activities (Gereffi and Kaplinsky 2001). It is argued that value chain analysis has advantages over traditional sectoral analysis because it allows researchers to focus on the dynamic flow of economic and organisational activities. This emphasis on the interlinkages between elements of the value chain provides the opportunity to examine both economic flows and

governance issues (Kaplinsky and Morris 2000). The ODI (2009) defines the term value chain in the context of tourism as the ‘full range of services that are required to bring a tourist to a destination and provide all the necessary services. The concept of ‘connectedness’ is core to understanding value chain analysis (Humphry and Navas-Aleman 2010). This notion of connectedness posits that the production of goods and services is dependent on an interconnected set of activities with multiple actors at each stage of the value chain. Tourism products and services may be perceived as value added chains of different components which combine to form service networks (Zhang et al. 2009). In the tourism industry the typical value chain includes a range of functions and processes combined with linkages to a wide range of service industries.

Value chain analysis can act as a mapping tool which enables researchers to analyse each link in the tourism value chain. It is associated with the concept of pro poor tourism because it allows researchers to examine each stage of a highly complex industry with multiple participants and it is seen by some stakeholders as a useful model to highlight opportunities for pro poor interventions (Mitchel et al. 2009). A three-stage framework for value chain analysis has been developed (Mitchell et al. 2009; ODI 2009) which incorporates situational diagnostic; scoping and prioritization of opportunities; and intervention planning. A diagram of the framework is reproduced below.

Table 2. 1: Three Stage Framework for Value Chain Analysis.

| | | | |
|--|---------------|---|--|
| Phase 1: Diagnosis | Step 1 | Preparation | To define the destination, type of potential target group, and assessment team/partners |
| | Step 2 | Map the big picture: enterprises and other actors in the tourism sector, links between them, demand and supply data, and the pertinent context. | To organise a chaotic reality, understand the overall system. |
| | Step 3 | Map where the poor do and do not participate. | To avoid erroneous assumptions about poor actors. To take account of the less visible suppliers. |
| | Step 4 | Conduct fieldwork interviews in each node of the chain, with tourists and service providers, including current/ potential poor participants. | To provide data and insights for Steps 5 to 8. |
| | Step 5 | Track revenue flows and pro-poor income. Estimate how expenditure flows through the chain and how much accrues to the poor. Consider their returns and factors that enable or inhibit earnings. | To follow the dollar through the chain down to the poor and assess how returns can be increased. |
| Phase 2: Scope and prioritise opportunities | Step 6 | Identify where in the tourism value chain to seek change: which node or nodes? | To select areas ripe for change, drawing on Steps 1 to 5. To ensure Steps 6 to 8 are focused on priority areas. |
| | Step 7 | Analyse blockages, options, and partners in the nodes selected, to generate a long list of possible interventions. | To think laterally and rationally in generating the range of possible interventions. |
| | Step 8 | Prioritise interventions on the basis of their impact and feasibility. | To generate an intervention shortlist, comprising interventions most likely to deliver impact. |
| Phase 3: Feasibility and planning | Step 9 | Intervention feasibility and planning. | Package selected interventions for funding and implementation. |

Source: Mitchell et al. (2009) and Overseas Development Institute (2009)

Over the past decade non-government organisations in developing economies have increasingly made use of value chain analysis in strategy development and project work (Bolwig et al. 2010; Rogers and Visser 2011; Ndivo and Cantoni 2015). It is seen as a useful diagnostic tool which can identify critical

issues and barriers for specific groups (Mitchell et al. 2009). It is useful because of its ability to identify activities which result in an increase in economic revenue and contribute to the local economy. Many development initiatives propose deeper integration of developing economies with global markets as a means of alleviating poverty. Value chain analysis is well established as a method for analysing differential market relationships in developing economies in a range of industries. However, it is argued that in the context of pro-poor tourism, it has been applied too simplistically with the primary focus on linkages within tourism destinations rather than the wider global context Harrison (2008). Studies (Gibbon and Ponte 2005; Fold and Larsen 2008) approach value chain analysis from the perspective of identification of opportunities for local participants in the value chain to 'upgrade'. However, Bolwig et al. (2010) note that such an approach is too narrowly focused, and they refer to the lack of literature in this field from the perspective of its impact on poverty, gender, and the environment. Humphry and Navas-Aleman (2010) find that evidence for the effectiveness of the value chain approach on poverty reduction was largely anecdotal with little valid evidence presented based on impact assessment.

2.8 Linkages in the Tourism Value Chain

The concept of linkages is integral to value chain analysis and the tourism industry is often promoted for its potential to facilitate inter-sectoral linkages (Cai et al. 2006; Meyer 2007; Nyaupane and Poudel 2011; Adiyia et al. 2015). The rationale for facilitating linkages is to minimise high levels of imports in the tourism sector through substitution with local goods and services (Meyer 2007). A definition of local linkages is the range of means by which corporate and medium-sized businesses develop economic links with small, medium and micro enterprises (SMMEs) and residents in their local economy (ODI 2006). An

analysis of the economic contribution of the tourism value chain on local communities needs to examine backward linkages with suppliers to the tourism industry and forward linkages with tourists (Tregos et al. 2010). The creation of local linkages has been identified as the key criterion for the cascading benefits of tourism to local communities and contributing to poverty reduction (Torres 2004).

However, there is a body of literature which calls into question the strength of these linkages. Research conducted by Mbaiwa (2000) found weak linkages (0.5 per cent of agricultural purchases locally) between the tourism sector and the local economy in north-west Botswana. In the context of tourism in the Caribbean (Taylor et al. 1991; Freitag 1994) found weak linkages between tourism and the local economy in the Bahamas and the Dominican Republic, respectively. More recently reports (Mitchell and Ashley 2010) and United Nations Conference on Trade and Development (UNCTAD 2010) noted low levels of linkages between tourism and the rural economy in Lao People's Democratic Republic. The reports suggest that rather than facilitating linkages, tourism contributes to increases in imports and expenditure of foreign exchange earnings. Much of the literature on this subject has concentrated on linkages between tourism and the agricultural sector (Torres 2013). However, Meyer (2007) sets out a conceptual framework for creating linkages between the tourist accommodation sector and poor households in the local community in developing countries. That framework focuses on four types of linkages, (i) employment (ii) sourcing and procurement (iii) small and medium enterprise (SME) development and outsourcing and (iv) other types of partnership. Linkages may be analysed at the level of an enterprise and its links with the

local economy or at an inter-sectoral level between tourism and other sectors of the economy.

The effects of tourism on poor households can be classified under three headings (ODI 2010). Firstly, direct effects relate to remuneration received by members of poor households who are directly employed in the tourism industry. The second type of effect is classified as indirect effects. The indirect effects of tourism on poor households relate to the impact on the tourism industry on other sectors of the economy where members of poor households are employed. Indirect effects occur through the tourism value chain. Indirect effects also incorporate spending by people employed in tourism in the local economy. The third classification relates to the dynamic effects of the tourism industry which focus on the broader impact on the economy which in turn contributes to poor households. Dynamic effects of tourism encompass a wide range of factors including skills development, infrastructure planning, management of natural resources and taxation regimes.

2.9 Leakages in the Tourism Value Chain

The level of leakages in the tourism value chain is an important element in measuring the impact of tourism on poor households' incomes. A review of the literature demonstrates that there are a wide range of definitions of the term 'leakage' and differing approaches to its measurement (Lange 2011). Chok et al. (2007) observe that global tourism's key resources (airlines, e-commerce booking agents and hotel chains) tend to be owned by western commercial concerns. This results in a concentration in their profits and a leakage of revenue to richer countries rather than benefits for poorer countries. The United Nations Environment Programme (UNEP 2010) calculates that in most all-inclusive package tours, up to 80 per cent of travelers' expenditure goes to the

airlines, hotels and other international companies located in tourist generating countries and not to local businesses or workers. More specifically, leakage is defined in terms of the portion of tourism revenue that leaks into imports and pays foreign factors of production (Lejarraga and Walkenhorst 2010). UNCTAD (2010) takes a longer view of the value chain in which leakages can occur. This definition of leakage includes not only revenue which is lost by the destination economy but also revenue which does not reach the destination economy in the first place as it either remains in the tourism generating economy or goes to international transport companies. The UNCTAD (2010) definition is cited below;

“The process whereby part of the foreign exchange earnings generated by tourism, rather than reaching or remaining in tourist-receiving countries, is either retained by tourist-generating countries or other foreign firms.”

Expenditure on imports is seen as one of the primary contributors to leakages.

UNWTO (1995) identifies the following items as the main causes of leakage;

- Imports relating to construction.
- Imports of food and drinks.
- Repatriation of income and profits generated by tourists.
- Interest payments on loans from foreign financial institutions.
- Marketing expenses in tourism generating economics.

Diaz (2001) defines leakages under three headings, (i) external leakages, (ii) internal leakages and (iii) invisible leakages. External leakages relate to tourism spending which occurs outside the destination location and which make no contribution to the local economy. External leakages may revert to multinationals or investors located abroad via the transference of tourism

revenue or profits from the tourist receiving location to tourism generating countries or other foreign countries (UNCTAD 2010). Another type of external leakage is revenue which flows to external intermediaries (booking agencies, international transportation providers and travel insurance providers). This second type of external leakage is referred to as structural leakage (UNCTAD 2010) and relates to funds which never reach the destination location. Internal leakages primarily relate to spending on imported goods and services (Diaz 2001). This type of leakage can be high in emerging economies where tourist operators may be unable or unwilling to source goods and services locally. Invisible leakages are less tangible to define and measure but relate to opportunity costs frequently relating to financial issues such as tax minimisation and offshore investments (Diaz 2001). However, tourism is not the only industry which is affected by leakages in the value chain. A report by UNWTO (2002a) states that there is no proof that the levels of leakages in the tourism industry overall are any greater than those for other industrial sectors which depend on export markets.

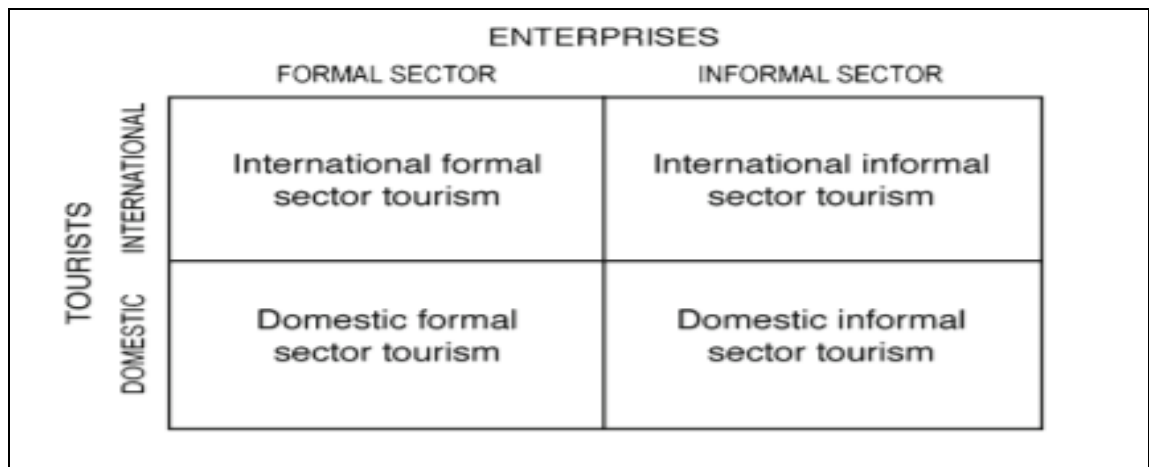
2.10 Significance of Domestic Tourism in Developing Countries

This research examines the contribution of tourism to livelihood enhancement of poor households in a destination and in a country where the vast majority of tourists are domestic. In this respect, this research addresses a gap in the current literature. This section comprises a review of literature relating to the importance and characteristics of domestic tourism in some developing economies and the relationship with poverty alleviation. Much of the literature on the relationship between tourism and poverty in developing countries is predicated on the assumption that tourists are international arriving from richer nations. Some research has been conducted on domestic tourism in developed

countries (Jafari 1987; Rogerson and Zoleka 2005). However, the role of domestic tourism in developing economies has received less attention than that of international tourism in the context of research in the field of tourism and development (Ghimire 2001; Scheyvens 2002; Gladstone 2005; Bigano et al. 2007; Cortés-Jiménez 2008; Ihalanayake, 2009; Singh, 2009; Skanavis and Sakellari 2011; Mejía and Brandt 2015; Singh and Krakover 2018; Cortes-Jimenez 2008; UNWTO 2012; Rogerson and Letsie 2013; Rodriguez et al. 2018). One reason for the neglect of domestic tourism may relate to the fact that it does not generate foreign exchange for developing economies. However, the nature of demand it gives rise to potentially has significant economic impact (Helleiner 2014). Ghimire (2001) relates the lack of research on domestic tourism to neocolonialist attitudes which tend to perceive tourists as privileged foreigners. A focus on developing infrastructure to attract and meet the needs of international tourists is characteristic of tourism strategies in many developing economies whilst failing to develop strategies to maximise the potential of rapidly expanding domestic tourist markets (Ghimire 2001; Scheyvens 2007).

Tourism in common with many other industries can be divided into formal and informal sectors. However due to the specific characteristics of the tourism industry, whereby the product is consumed at the point of production, tourism can be further classified into international and domestic sectors. Consequently, Gladstone (2005) posits a framework (figure 2.3) which conceptualizes tourism in developing economies in terms of international formal sector, international informal sector, domestic formal tourism and domestic informal sector (Rogerson and Letsie, 2013).

Figure 2. 3: Typology of Tourism in Developing Countries



Source: Rogerson and Letsie 2013

Helleiner (2014) observes that international tourism and domestic tourism are distinct products not only in terms of point of origin but also in terms of the extent of their social and economic impacts. Globally, data gathered by the World Travel and Tourism Council (WTTC) indicates that domestic tourism constitutes 73 per cent of total tourism expenditure (WTTC 2017). Overall, emerging economies comprised the top ten nations with the highest levels of dependency on domestic tourism. Statistics demonstrate that Bangladesh is ranked among the five countries where domestic tourism comprised over 97 per cent of travel and tourism consumption (WTTC 2017).

Domestic tourism has been defined by the WTO (1995) as a form of tourism, involving residents of the given country travelling only within this country. Quinn (2010) defines domestic tourists as residents of a country who travel overnight or on the same day within their own country. However, Erb (2003) and Scheyvens (2007) provide a more expansive definition which includes a subset of domestic tourists who may be referred to as *diaspora tourists*. This category of tourists incorporates citizens (or former citizens) of a country who ordinarily

live abroad but return for vacations. The inclusion of this group has particular relevance in the case of Bangladesh which traditionally has high levels of emigration. The rationale for the classification of these cohorts as 'domestic' is based on the premise that their tourism activities and expenditure patterns are more closely aligned with those of domestic tourists than international tourists (Scheyvens 2007). Another subset of domestic tourism is classified as visiting friends and relatives or VFR travel (Scheyvens 2007; Backer 2009). Backer (2009) proposes three conceptual models that describe tourist behaviours and linkages with actors in the tourism value chain with whom the VFR tourist interacts. The influence of Lieper's whole tourism system model (2004) can be observed as it provides the basis for Backer's (2008) VFR Whole Tourism Systems Model (Griffin 2013).

In relation to poverty alleviation, Rodriguez et al. (2018) compare the impact of domestic and inbound forms of tourism on poverty in a sample of 60 countries. Their findings indicate that while both domestic and international tourism reduced poverty rates (using World Bank poverty lines), domestic tourism demonstrated significantly higher pro-poor economic linkages than international tourism. Domestic tourism has different characteristics from international tourism, and it is proposed that these characteristics may result in different levels of impact on poverty (Jafari 1987; Gladstone, 2005; Winters et al. 2013). Research (Dwyer 2005; Winters et al. 2013) indicates that expenditure in real terms by domestic tourists may be significantly less than that of their international counterparts particularly in relation to accommodation. However domestic tourists may have greater impact in supporting backward economic linkages and income to poor households as their spending patterns may be closely linked to the local supply chain of goods and services in the formal and

informal economy. These findings are supported by research (Saayman et al 2000) which indicates that multiplier effect of domestic tourism spending exceeds that of inbound tourism and that the expenditure pattern of domestic tourists has significantly higher levels of local linkages. Additional advantages of the domestic form of tourism relates to its perceived ability to counterbalance the seasonal nature of international tourism and its potential for developing remote or peripheral destinations (Seckelman 2002; Williams and Hall 2002).

Review of the literature relating to domestic tourism and poverty reduction has shaped the development of the methods employed in this research in order to incorporate quantitative analysis of the different impacts of domestic and inbound tourists' expenditure on poverty headcount ratios based on a poverty line established by the World Bank. The impact of tourism expenditure on poor households is not directly related to the volume of tourists' expenditure it is also necessary to examine the expenditure patterns of different types of tourists. This research is based on an analysis of a tourism value chain in a destination which is predominantly dependent on domestic tourists. As such, it aims to contribute to the limited literature on the contribution of domestic tourists' expenditure patterns to poor households' incomes.

2.11 Informal Labour Market in Developing Economies

Much of the literature on the relationship between the tourism value chain and contribution to poor households' income has focused on specific sectors in the formal economy. The scope of the tourism chain analysed in this research is more extensive and incorporates actors operating in the informal as well as the formal economy. This section reviews literature on the characteristics of the informal labour market and its importance in the context of developing economies and tourism value chains. The concept of informal employment in

less developed economies has been recognised in literature produced by the International Labour Organisation (ILO) and the World Bank focusing on the relationship between poverty and labour markets and linkages with the formal economy (Sethuraman 1981; Barthelmes 2015; Vargas 2016). Research (Ashley 2002; Bah and Goodwin 2003; Harrison 2008) indicates that the integration of workers in the informal economy in the tourism value chain contributes to poverty reduction. However, as most of the literature on pro-poor tourism is based on research conducted in rural contexts (Chok et al. 2007), the contribution of important participants such as street vendors in the informal economy has been limited (Steel 2008; Dao Truong 2014; Trupp 2015).

The term 'informal economy' has been used for over five decades and was first used in the 1970s by the ILO in analysing the relationship between types of employment and poverty in developing economies (Sethuraman 1981). A definition of the term encompasses a diverse range of business enterprises, activities, job and workers that are outside the scope of state legal regulation (Chen 2012). The ILO conceptualisation of informal economy is characterised by (i) low entry barriers in terms of skill, capital, and organization; (ii) family ownership of enterprises; (iii) small scale of operation; (iv) labour-intensive production and (v) unregulated and competitive markets (Sethuraman 1981; Klein and Tokman 1988). The distinction between formal and informal businesses is identified in terms of their respective aims where the aim of activity in the formal sector is to maximise profits while for the actor in the informal business, the primary aim is to ensure the survival of her or his family (Portes and Schauffler 1993; Yotsumoto 2013).

The extent of the informal labour market in developing economies is often underestimated in developing economies due to lack of official data (Steel 2008;

Dao Truong 2017; Petrova 2019). In South Asia, the level of participation in informal employment (non-agricultural) is estimated at more than 80 per cent (Vanek et al. 2014). Employment in the informal economy has been categorised into two types (Losby et al. 2003). The first category comprises people who unofficially operate their own businesses on a part-time or full-time basis. Typically, this group is unregistered, and transactions occur in cash. The second category relates to people who work unofficially for employers on a short or long-term basis and without recourse to benefits such as insurance or sick pay. Studies (Rahman 2010; BBS and ILO 2015) indicate that between 75 to 80 per cent of Bangladeshis work in the informal labour market contributing 64 per cent of GDP. The major characteristics of the informal sector in Bangladesh are characterised by (i) small scale operation; (ii) low level of productivity (iii) low level of income generation (iv) low level of access to credit facilities and casual employment but mostly not on a contract basis; and (vi) an absence of recognition or regulation by the government (Raihan 2010; Mondal 2017). Research in Bangladesh (Rahman et al. 2019) indicates the significant disparities ranging from 65 per cent to 225 percent in wages for formal and informal employees, formal and informal day labour, and formal and informal self-employed. Research (Varley 1978; Echtner 1995; Rogerson and Letsie 2013; Damayanti et al. 2018) indicates that much of employment in the tourism value chain comprises shop holders, souvenir sellers, guides and street vendors who fall into the category of the informal sector. Varley (1978) notes a correlation between the linkages in the tourism value chain and the impact on indirect employment.

There is evidence in the literature (Amuedo-Dorantes 2004; Devicienti et al. 2009) that poor households are more likely to have a member working in the

informal sector. However, the informal workforce is not homogenous; rather it is characterized by diversity and segmentation with different potential for household income associated with different segments (Chen et al. 2015). There are gaps in income within these segments of the informal labour market based on employment status. Research in India and South Africa (Sastry 2004; Rogan 2019) identifies a hierarchy of poverty risk across these segments; informal employers have the lowest risk of poverty followed by their employees and other “regular” informal wage workers, while casual wage workers and day labourers have the highest poverty risk. From a gender perspective, the average earnings of female workers in the informal labour market are lower and the risk of poverty is higher in all segments (WIEGO 2020).

2.12 Critiques of Pro-Poor Tourism

Proponents of pro-poor tourism emphasise the industry’s potential to lift communities out of poverty based on its labour intensive character and high level of linkages with local economies. However, there is a body of research which questions and challenges the claims made for tourism as a means of facilitating economic benefits for the poor (Scheyvens 2002: 2007: 2009: 2011; Schilcher 2007: 2009; McLaren 2003; Hall 2007; Chok et al. 2007; Blake et al. 2008; Harrison 2008; Honey et al. 2010: 2012; Saayman et al. 2012; Scheyvens and Russell 2012; Thomas 2012; Winters et al. 2013; Croes 2014; Mahadevan and Suardi 2017). It is argued (Chok et al. 2007) that tourism is inclined to be presented as a panacea to economic and environmental problems and underestimates the political aspects of tourism and that that tourism is detrimental on a cultural, economic and environmental level (Christ et al. 2003; Wearing and Mc Donald 2002; Chok and Macbeth 2007; Scheyvens and

Hughes 2012: 2019). Spenceley and Meyer (2012) link the evolution of pro poor tourism to the Washington Consensus in 1989 with its emphasis on the International Monetary Fund (IMF) and the World Bank's market policies of liberalisation and privatisation. In this context, tourism is seen as another industry which developing countries can exploit for economic growth debt restructuring and poverty reduction. Pro-poor tourism is seen as being aligned with the World Bank's concept of pro-poor growth predicated on linking poor communities with mainstream tourism markets (Barasa 2010; Marx 2011). The fundamental criticisms of pro-poor tourism relate to this perceived association with a neo- liberal economic agenda and also its links with mainstream tourism. Critics such as Scheyvens (2007) assert that pro-poor tourism's acceptance of neo-liberal economic values disadvantage the poorest people in developing economies. Erbelei (2000) notes a tendency to root the causes of poverty on protected economies, and a lack of adherence to economic reforms and globalisation. The effect of this approach it is argued is a neo-liberal tendency to place responsibility for poverty on the developing nations rather than on external institutions and structures. Chok and Macbeth (2007) observe that global tourism's key resources tend to be owned by western commercial concerns which results in a concentration in their profits and a leakage of revenue to richer countries rather than benefits for poorer countries. From this perspective tourism, operating within a neoliberal framework, is characterised as externally owned and managed and as exacerbating poverty and exploitation rather than contributing benefits to poor households and communities (Wearing and Mc Donald 2002; Chok and Macbeth 2007; Gartner and Cukier 2012).

A further criticism of the concept of pro-poor tourism is that it does not address systemic change in social and economic structures and that it lacks theoretical

grounding and methodological rigour (Scheyvens 2007; Harrison 2008). Harrison (2008) puts forward the argument that the concept of pro-poor tourism, by its nature is unsuited as a tool for poverty alleviation because it operates within the context of international capitalism. Harrison (2008) and Schilcher (2007) question the 'growth bias' of pro-poor tourism advocates asserting that providing 'net benefits to the poor' is insufficient if there is not an equitable sharing of benefit among the rich and the poor. Schilcher (2007) notes that the term 'the poor' includes a range of poverty levels and argues that it is necessary to distinguish between 'the poor' and 'the poorest' as growth strategies may reduce the number of people living below a poverty line while at the same time increasing poverty levels among the poorest and most economically vulnerable sections of society. Some critical research suggests that not only does tourism provide relatively little contribution to poverty reduction at a household level (Scheyvens 2011) but that it can also in some cases, exacerbate poverty for the poorest households and enable more benefits to accrue to the rich (Chok et al. 2007; Schilcher 2007; Blake et al. 2008; Scheyvens 2009; Cole and Morgan 2010; Holden et al. 2011; Gartner and Cukier 2012; Saayman et al. 2012).

From a gender perspective, advocates of pro-poor tourism assert that tourism is particularly beneficial for women in terms of employment opportunities Ashley and Roe (2002) argue that the development of the tourist industry is congruent with the concept of pro-poor growth because tourism tends to provide opportunities for women's participation in the labour market thereby increasing incomes in poor households. However, there is research which disputes not only claims relating to the economic benefits of tourism for the poor in general but specifically in relation to poor women. It is argued that tourism employment in developing economies perpetuates gender stereotypes, and low pay (New

Zealand Aid 2012). Ferguson (2011) critically analyses the relationship between tourism and gender equality in the context of the policies and strategies of the UNWTO and the World Bank. The analysis concludes that theoretically tourism has the potential to empower women socially and economically, however tourism policies require systemic review in order to achieve this goal.

2.13 Pro-Poor Tourism and Community-Based Tourism

Marx (2006) notes a tendency among some commentators to conflate the concepts of pro-poor tourism and community-based tourism. A review of the literature reveals a contradictory perception of the relationship between community-based tourism and pro-poor tourism. On one hand, a tendency is observed to incorporate community-based tourism within a pro-poor tourism framework (Pleumaron 2002; Beeton 2006; Harrison 2008). Alternatively, community-based tourism is presented as radically different from pro-poor tourism at a philosophical and political level (Saayman and Giampiccolo 2015). From the latter perspective, pro-poor tourism and community-based tourism are perceived as distinct concepts emerging from different historical and ideological frameworks. Pro-poor tourism is linked to market forces and mainstream tourism as described above while the community-based tourism approach is underpinned by principles of social justice and redistributive aims (Saayman and Giampiccolo 2015). There is no consensus on a definition of community-based tourism (Trejos and Chang 2009), but the main components have been identified as community participation, power distribution, collaboration and the development of social capital (Okazaki 2008; Scaglione et al. 2013). Community based tourism emphasises empowerment of local communities and the active participation of those communities in tourism projects to a greater extent than pro-poor tourism (Kaur et al. 2016). However, the benefits of community-based

tourism have not been extensively quantified (Goodwin and Santilli 2009; Lemma 2014) and research (Bianchi 2002; Dolezal 2015) indicates that empowerment within communities can be limited and unequal preventing meaningful participation by the poorest.

Where pro-poor tourism has been criticised for its market-oriented approach, community-based tourism projects are found lacking because of their lack of scale and disconnect from commercial tourism distribution channels. (Ashley and Goodwin 2007; Mitchell and Muskosy 2008; Nadkarni 2008; Spenceley 2008; Mitchell and Ashley 2009; Sofield 2011; Tolkach and King 2015). Community based tourism projects are characterised as small scale and donor driven (Vissar and Ferreira 2013) and well intentioned with a focus on issues of empowerment, participation and capacity building but lacking in business management fundamentals (Hausler 2008 cited in Spenceley and Meyer 2012). Consequently, community-based tourism initiatives are criticised for lacking financial sustainability (Marx and Johnson 2011; Gascon 2013). By contrast proponents of pro-poor tourism (Ashley and Roe 2002; Meyer 2008) emphasise its effectiveness in contributing to poor households' incomes due to the ability to harness market forces. Community based tourism is presented as alternative to mainstream tourism and as a niche product associated with smaller scale projects (Harrison 2011; Weaver 2011; Tolkach et al. 2013). Pro-poor tourism cannot be defined in terms of a niche product but rather as a set of strategies. Scaglione et al. (2011) notes that despite the significant differences between the two concepts, they are not mutually exclusive in their implementation. However, the emphasis in pro-poor tourism is on identifying and dismantling barriers preventing poor households from benefitting

economically from engagement with mainstream tourism rather than attempting to create an alternative form of tourism that is pro-poor.

2.14 Chapter Summary

This chapter has been devoted to a review of the ‘diverse and fragmented’ literature relating to the relationship between tourism and poverty alleviation (Zhao and Ritchie 2007) and the use of value chain analysis as a tool for identifying leakages and linkages in the tourism value chain. There are divergent conclusions in the literature regarding the correlation between tourism and economic growth in developing countries in different geographical locations (Shan and Wilson 2001; Balaguer and Cantavella-Jordá 2002; Durbarry 2002; Torres 2004; Blake 2008 Honey and Gilpin 2009. Similarly, research relating to the relationship between tourism and poverty alleviation in an economically and geographically diverse range of countries produces findings which both support and contradict the assertion that tourism is pro-poor. The scope of the literature review encompasses Njoya and Seetaram’s (2018) conceptual framework with a focus on the income channel through which tourism expenditure is assessed as having a positive impact on poverty reduction.

Review of the literature demonstrates that poverty is a complex concept, the definition of which has evolved over time (Baulch 1996) from a purely monetarist approach to a more holistic conceptualisation (Sen 1987). Similarly, methods and conceptual approaches to poverty measurement demonstrate a high level of diversity which in turn influences poverty reduction strategies. The review has examined the complex nature and specific characteristics of the tourism industry (Jafari 1977; McIntosh and Goeldner 1986; Gunn 1988; Leiper 2004; Sofield and McTaggart 2005) and its potential contribution to poverty reduction. Value chain analysis has been increasingly incorporated into tourism-

based poverty reduction initiatives in international development (Bolwig et al. 2010). In this review, the evolution of the value chain concept has been traced and research into linkages (Cai et al. 2006; Meyer 2007; Mitchell and Ashley 2010) and leakages (Diaz 2001; Chok et al. 2007; Lejarraga and Walkenhorst 2010; Lange 2011) in the tourism value chain has been reviewed.

The scope of the review of literature incorporates Gladstone's (2005) typology of tourism which draws distinctions between domestic and international tourism and formal and informal sector tourism (Rogerson and Letsie 2013). The under-researched phenomenon of domestic tourism in developing countries (Saayman et al. 2000; Ghimire 2001; Scheyvens 2002; Singh 2009; Rogerson and Letsie 2013) has been addressed. Research on the role of the informal labour market in developing economies and the impact on poverty has also been analysed. The literature review indicates that criticism of the concept of pro-poor tourism is predicated on its perceived lack of socio-economic perspective and its alleged neoliberal tendencies (Chambers 1995; Chok and Macbeth 2007; Scheyvens 2007; Harrison 2008). Literature on the relationship between pro-poor tourism and community-based tourism and the difference between these two concepts has been examined.

The literature review supports the use of an approach based on the principles of value chain analysis in order to identify linkages and leakages in the tourism value chain. It also confirms the importance of including actors within the informal economy in the scope of research to measure the contribution of tourists' expenditure to poor households' income. These insights from the literature review inform the research framework to identify the extent to which tourism in Cox's Bazar may be considered pro-poor. The review of literature has not found research related to the tourism value chain and poverty specifically in

the context of Bangladesh. Moreover, most research in the field of pro-poor tourism has focused on a limited number of actors in the tourism value chain rather than the impact on poor households of engagement with a wider range of actors in both the formal and informal economies. There is also limited research into pro-poor tourism which includes a focus on the contribution of domestic tourism expenditure to poor households' incomes. This research aims to address these gaps.

CHAPTER 3: ECONOMY, TOURISM AND POVERTY IN BANGLADESH

3.1 Introduction

In this section an analysis of political, economic and demographic factors impacting Bangladesh and its tourism industry is presented. There is an overview of the Bangladesh economy which has undergone a process of transition from a predominately agricultural to a diversified economy with a rapidly growing role for manufacturing and services sectors. Economic development strategies in Bangladesh are examined in the context of a series of five-year national development plans including the significance of the designation of tourism as a *thrust sector*. The impact of poverty alleviation strategies in the national development plans is analysed and the relationship between increasing economic growth and decelerating levels of poverty reduction is addressed. The development of the tourism industry in Bangladesh is outlined and an analysis of the impact of government tourism development policies is presented. Background to the issue of gender and employment in Bangladesh is discussed. This chapter concludes with an analysis of the significance of Cox's Bazar as the country's most popular tourism destination and poverty indicators in the resort.

3.2 An Overview of the People's Republic of Bangladesh

The People's Republic of Bangladesh was founded in 1971 after a war of liberation against Pakistan. In terms of political structure, the country has a system of parliamentary democracy. The constitution has four official pillars, which are democracy, nationalism, secularism, and socialism. Bangladesh is a founding member of the South Asian Association for Regional Cooperation (SAARC), the Bay of Bengal Initiative for Multi-Sectoral Technical and

Economic Cooperation (BIMSTEC), Bangladesh-China-India-Myanmar Forum for Regional Cooperation (BCIM) and the Bangladesh Bhutan India Nepal Initiative (BBIN). It is also a member of a range of regional and international organisations including the Organisation of Islamic Cooperation (OIC), Commonwealth of Nations, the Developing 8 (D-8) Organisation for Economic Cooperation, the Indian-Ocean Rim Association (IORA), the Non Aligned Movement, the Group of 77 and China and the World Trade Organization (WTO).

Geographically the nation is located at latitude 23.684994 and longitude 90.35631. Bangladesh has an area of 147,570 square kilometres and shares borders with India and Myanmar. It is divided into seven administrative divisions-Dhaka, Chittagong, Khulna, Rajshahi, Barisal, Sylhet and Rangpur. Each division is divided into several administrative districts with a total of 64 districts. There are three international airports in Dhaka, Chittagong and Sylhet and domestic airports in Cox's Bazar, Jessore, Rajshahi, Syedpur, Barisal, Iswardi, Comilla and Thakurgaon. There are two seaports in Chittagong and Mongla (Government of Bangladesh 2015).

Dhaka and Chittagong are the financial centres of the country and the respective locations of the Dhaka Stock Exchange (DSE) and the Chittagong Stock Exchange (CSE). The total population is estimated at 166.37 million with a labour force of 80.27 million. Bangladesh ranks as the seventh most populous country in the world. It has a population density of 1,115.62 people per square kilometre which means the country ranks as having the tenth highest population density in the world. It is predicted that the country's population will surpass 220 million by 2050 and currently 20 per cent of the population is comprised of 15- to 25-year-olds. The gender ratio is 95 men to 100 women or 0.95 and this

gender ratio is lower than the global average of 101 men to 100 women) or 1.01 (Central Intelligence Agency [CIA] 2018). The total dependency ratio of population in Bangladesh which incorporates that part of the population which is not generally in the labour market is 63.7 per cent (World Bank 2018). Table 3.1 provides an overview of key demographic data relating to Bangladesh in the five-year timeframe from 2012 to 2017.

Demographically, in terms of ethnicity the country is relatively homogenous with Bengalis constituting 98 per cent of the population. However, in the 2010 Cultural Institution for Small Anthropological Groups Act the Bangladeshi government officially recognises 27 ethnic minority groups with distinctive customs and languages. Some commentators (Minority Rights Group International [MRGI] 2018) note that this is an underestimation of ethnic minority groups which could number more than seventy-five. The four main religions are Islam (89.8 per cent of the population), Hinduism (9.1 per cent), Buddhism (0.5 per cent) and Christianity (0.2 per cent) (Pew Research Center [PRC] 2010) with visitors to religious sites and festivals constituting a key component of Bangladesh's domestic tourism sector.

Table 3. 1: Bangladesh Demographic Information

| Indicator | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 |
|---|-------|-------|-------|-------|-------|-------|
| Population, total (million) | 1.56 | 1.58 | 1.59 | 1.61 | 1.63 | 1.65 |
| Population, male (% of total) | 50.50 | 50.48 | 50.47 | 50.46 | 50.44 | 50.42 |
| Population, female (% of total) | 49.49 | 49.51 | 49.52 | 49.53 | 49.55 | 49.57 |
| Agricultural land (sq. km-thousands) | 91 | 91 | 90 | 91 | 91 | 91 |
| Agricultural land (% of land area) | 70 | 70 | 70 | 70 | 70 | 70 |
| Labour force, total (million) | 61 | 62 | 63 | 64 | 65 | 66 |
| Labour force participation rate, male (% of males aged 15-64) | 84.47 | 83.86 | 83.23 | 82.58 | 81.93 | 81.93 |
| Labour force participation rate, (% of females aged 15-64) | 32.35 | 32.91 | 33.48 | 34.04 | 34.59 | 34.75 |
| Employment in services (% of total employment) | 33.90 | 34.11 | 35.33 | 36.87 | 38.02 | 39.84 |
| Employment in services, male (% of male employment) | 38.24 | 38.27 | 40.57 | 43.09 | 44.44 | 46.41 |
| Employment in services, female (% of female employment) | 21.91 | 22.76 | 21.33 | 20.65 | 21.64 | 23.22 |
| Urban population (% of total) | 31.99 | 32.75 | 33.51 | 34.27 | 35.03 | 35.79 |
| Rural population (% of total population) | 68.01 | 67.24 | 66.48 | 65.72 | 64.96 | 64.21 |

Source: World Bank-Bangladesh 2018

Map 3. 1: Map of Bangladesh



Source: Bangladesh Bureau of Statistics 2017.

3.3 Overview of the Economy in Bangladesh

Bangladesh is classified as a frontier economy and has been included in the Next Eleven (N 11) economies. The N11 are categorised as those countries which have a possibility of evolving into the world's largest economies in addition to Brazil, Russia, India and China (BRIC) nations by 2025 (Wilson and Stupynytska 2007) using a Growth Environment Score (GES). The GES comprises indices related to macroeconomic stability, macroeconomic conditions, technological capabilities and human capital and political conditions. The Bangladesh Bureau of Statistics (BBS 2017) notes that over the past decade the annual rate of economic growth has averaged over 6 percent. In the course of that timeframe the economy has transitioned from a largely agrarian based economy to a more diversified, manufacturing based economy. In the financial year 2017 the highest recorded rate of GDP growth was achieved at

7.28 percent. The Bangladesh government has set itself the target of achieving the status of Middle-Income Country (MIC) by 2021 and advanced economy status by 2041 (World Bank 2018).

The Bangladeshi economy is heavily dependent on human resources, agricultural production and water resources. The agriculture sector is mainly focused on rice production, but it also includes tea, jute, wheat, sugarcane, tobacco spices and fruit. Bangladesh is the world's fourth largest rice producer, although shortages caused by natural disasters occasionally make it necessary to import rice. The garments industry is the largest component of the industrial sector with textile exports representing 80 per cent of the total exports and surpassing USD 34 billion in 2017. Other industrial products include paper, fertilisers, leather, metals, and pharmaceuticals (Kathuria and Malouche 2016). Table 3.2 provides a breakdown of data relating to employment by the agricultural, industrial and services sectors.

Table 3. 2: Economic Activityy Breakdown in Bangladesh

| Breakdown of Economic Activity by Sector | Agriculture | Industry | Services |
|---|-------------|----------|----------|
| Employment by Sector (in % of Total Employment) | 39.1 | 21.1 | 39.8 |
| Value Added (in % of GDP) | 14.8 | 28.8 | 56.5 |
| Value Added (Annual % Change) | 2.8 | 11.1 | 6.2 |

Source: World Bank 2018

The export performance of the Bangladeshi economy has been strong in recent years. Bangladesh's main exports are garments, knitwear, agricultural products, fish and seafood, jute and jute goods and leather goods. The top five markets for Bangladeshi exports are the United States (16.3 per cent), Germany (11.8 per cent), UK (7.7 per cent), France (4.8 per cent) and the Netherlands (4.7 per

cent). The economy is heavily concentrated on the garment industry and fish and seafood exports. In 2017 82 per cent of total export earnings could be attributed to the garment industry (Asian Development Bank [ADB] 2017 and Bangladesh Bank [BB] 2018). Table 3.3 illustrates the incremental increase in contributions to GDP growth by the manufacturing and services sectors during the period 2013 to 2017.

Table 3. 3: Incremental Contribution to GDP Growth 2013-2017

| Industrial Origin Sector | FY13 | FY14 | FY15 | FY16 | FY17 |
|------------------------------------|------|------|------|------|------|
| Agriculture Sector (%) | 0.41 | 0.70 | 0.53 | 0.43 | 0.44 |
| Industries Sector (%) | 2.59 | 2.27 | 2.74 | 3.24 | 3.10 |
| Manufacturing (%) | 1.80 | 1.60 | 1.93 | 2.26 | 2.21 |
| Services Sector (Tourism is inc.%) | 2.88 | 2.92 | 3.00 | 3.21 | 3.41 |
| Public Administration (%) | 0.21 | 0.22 | 0.32 | 0.38 | 0.32 |
| Education (%) | 0.13 | 0.16 | 0.17 | 0.26 | 0.26 |
| Health and Social Works (%) | 0.09 | 0.09 | 0.09 | 0.13 | 0.13 |
| Wholesale and Retail Trade (%) | 0.28 | 0.23 | 0.25 | 0.88 | 0.99 |
| Financial Intermediations (%) | 0.28 | 0.29 | 0.29 | 0.25 | 0.30 |
| GDP Growth (%) | 6.01 | 6.06 | 6.55 | 7.11 | 7.28 |

Source: BBS 2017

In addition, an analysis of the ten largest Bangladeshi companies listed on the Dhaka Stock Exchange (table 3.4) provides further evidence of the increasingly diverse nature of the economy (Dhaka Stock Exchange 2018). The pharmaceutical, telecommunications and financial services sectors are fast growing and are perceived by policy makers as having significant potential for export growth and employment creation.

Table 3. 4: Ten Largest Bangladeshi Companies by Trading Value 2018

| Rank | Company | Industry | Trading Value (BD Tk. Million) |
|------|-------------------------------------|--------------------|--------------------------------------|
| 1 | Square Pharmaceuticals Limited | Pharmaceuticals | 449 |
| 2 | Dragon Sweater and Spinning Limited | Apparel | 129 |
| 3 | IFAD Autos Limited | Automotive | 117 |
| 4 | Grameenphone Private Limited | Telecommunications | 106 |
| 5 | Bangladesh Thai Aluminum Ltd | Manufacturing | 99 |
| 6 | City Bank Limited | Banking | 78 |
| 7 | Golden Harvest | Agriculture | 76 |
| 8 | IPDC Finance Limited | Financial Services | 67 |
| 9 | Olympic industries limited | Manufacturing | 60 |
| 10 | Shahjalal Bank Private Limited | Banking | 53 |

Source: Dhaka Stock Exchange (2018)

Infrastructure spending has been identified as central to future economic growth (Bhattacharya and Rahman 2018). However, tax revenue in Bangladesh is 9 per cent of GDP and this rate is relatively low compared to average tax revenue to GDP ratio for non-resource rich, low-income countries of around 15 percent (International Monetary Fund [IMF] 2018). Although 14 per cent of the annual budget (1.93 per cent of GDP) is dedicated to education, this level of expenditure is still below the United Nations International Children's Emergency Fund's (UNICEF) recommendations of 20 per cent of annual budget and 6 per cent of GDP (UNICEF 2018). The economy of Bangladesh is also characterised by relatively high levels of remittances from expatriate workers, many of whom work in the hospitality and tourism sectors. In 2014 remittances from the 8 million expatriate Bangladeshis accounted for over USD 13.86 billion (Akter 2016) and these remittances contributed to Bangladesh's foreign currency reserves.

3.4 Foreign Investment in the Bangladeshi Economy

Bangladesh's strategic geographic position and the government's support for private sector led growth have made the country a relatively attractive centre for foreign investment. Foreign Direct Investment (FDI) exceeded USD 2.4 billion in 2017 (Bangladesh Bank 2017). Table 3.5 illustrates the five sectors which attract most investment.

Table 3.5: FDI Inflows- Five Largest Sectors

| Sectors | USD (Million) |
|----------------------------|---------------|
| Telecommunications | 539.89 |
| Textiles Industry | 360.35 |
| Power Sector | 334.26 |
| Banking Sector | 155.58 |
| Gas and petroleum Industry | 133.67 |

Source: FDI Inflows -Bangladesh Bank 2017

Major foreign investors in the economy include China, India, Japan, United States, South Korea, the United Kingdom, Malaysia and the United Arab Emirates. Bangladesh is involved in China's *One Belt One Road* initiative and the Chinese and Bangladeshi governments signed 27 development agreements totaling USD 25 billion in 2017. In the same year, Bangladesh was the beneficiary of USD 4.5 billion in credit from India for economic assistance and development projects. Manufacturers in a range of more developed Asian economies have outsourced factory production to Bangladesh mainly in the textiles sector (ADB 2016). The ten largest investor nations are listed in table 3.6.

Table 3.6: FDI in Bangladesh by Country

| Countries | USD (Million) | Share (%) |
|--------------------------|---------------|-----------|
| Singapore | 701.40 | 28.57 |
| United Kingdom | 313.87 | 12.79 |
| United States of America | 208.71 | 8.50 |
| Norway | 187.41 | 7.63 |
| South Korea | 178.50 | 7.27 |
| Hong Kong | 111.70 | 4.55 |
| India | 95.41 | 3.89 |
| Netherlands | 90.04 | 3.67 |
| China | 68.58 | 2.79 |
| Thailand | 58.69 | 2.39 |

Source: FDI Inflows -Bangladesh Bank 2017

3.5 The Banking Sector in the Bangladeshi Economy

The banking sector in Bangladesh has experienced significant growth over the past decade. The Asian Development Bank Institute (ADBI 2017) categorises four types of banks which operate in formal financial markets — public sector commercial banks (PSCBs), development financial institutions (DFIs), private commercial banks (PCBs), and foreign commercial banks (FCBs). In Bangladesh, the banking sector incorporates 56 banks including four PSCBs, four DFIs, 39 PCBs, and nine FCBs. Nationally there is a network of 8,794 total branch offices. The microfinance sector has a significant presence particularly in rural areas and, as of 2018, there were 705 licensed micro-finance institutions operating a network of 17,241 branches with 33.17 million members. A 2014 Institute of Microfinance survey study showed that around 40 percent of the adult population and 75 percent of households had access to financial services in Bangladesh (ADB 2016). The role of microfinance in relation to poverty alleviation is discussed in section 3.11.2 of this chapter.

3.6 Government Economic Development Strategies in Bangladesh

Economic development strategies in Bangladesh are formulated within the context of national development plans and a series of five-year plans coordinated by the Bangladesh Planning Commission. Article 15 of the Bangladesh constitution stipulates that the country should pursue a strategy of a planned economy in order to achieve its development objectives. Between 1973 and 2002 Bangladesh implemented five successive five-year plans and an interim two-year plan (1979 to 80). Table 3.7 illustrates key indicators relating to outcomes of the sequence of national development plans.

Table 3.7: Bangladesh Achievements in 5-Year Plan Periods

| Specific Plan | Plan Periods (FY) | Average GDP Growth Rate | | Per Capita GDP Growth | Per Capita GNI | Life Expectancy | Poverty Ratio |
|---------------|-------------------|-------------------------|---------|-----------------------|----------------|-----------------|---------------|
| | | Plan% | Actual% | % | USD | Years | % |
| First Plan | 1973-1978 | 5.5 | 4.0 | 1.3 | 111 | 53.07 | 82.1 |
| Second Plan | 1980-1985 | 5.4 | 3.8 | 1.5 | 145 | 55.10 | 69.9 |
| Third Plan | 1985-1990 | 5.4 | 3.8 | 1.6 | 204 | 56.10 | 56.6 |
| Fourth Plan | 1990-1995 | 5.0 | 4.2 | 2.4 | 253 | 58.70 | 50.1 |
| Fifth Plan | 1997-2002 | 7.1 | 5.1 | 3.5 | 431 | 64.90 | 48.9 |
| Sixth Plan | 2011-2015 | 7.1 | 6.3 | 4.9 | 1314 | 70.70 | 24.8 |

Source: Sixth Five Year Plan, FY 2011-FY 2015, GED (2015)

The Bangladesh government has pursued a policy of actively seeking to attract foreign investment, particularly in the areas of energy and infrastructure. Many incentives have been implemented through a public-private partnership (PPP) programme launched in 2009. The Industrial Policy Act of 2016 provides incentives for three types of industries - environmental or 'green' industries, high-technology, or what are termed "transformative" industries.

Financial and policy support will be provided by the government for industries that create large-scale employment and earn substantial export revenue with a focus on the creative industries and the Information and Communications Technology (ICT) sector as well as agriculture and food processing, ready-made garments (RMG), pharmaceuticals, leather and leather products. In order to reduce the risks of being over dependent on industrial production in the textile sector the government is seeking to develop certain sectors by incentivising companies involved in these areas. These sectors have been termed *thrust sectors* and include agricultural and agro-industrial products, light engineering, leather footwear and leather goods, pharmaceuticals, software and ICT products, as well as ship building.

The tourism industry is included as a thrust sector (Santander 2018). In 1983 the government introduced Export Processing Zones (EPZs) under the auspices of the Bangladesh Export Processing Zones Authority (BEPZA). An EPZ is defined as a territorial or economic enclave in which goods may be imported and manufactured and reshipped with a reduction in duties and minimal intervention by custom officials (World Bank 2007). In order to attract foreign and local investment an EPZ provides companies with plots or factory buildings in a custom bonded area, infrastructural facilities, administrative facilities and tax incentives. There are currently eight EPZs; Chittagong EPZ, Dhaka EPZ, Mongla EPZ, Ishwardi EPZ, Comilla EPZ, Uttara EPZ, Adamjee EPZ, Karnaphuli EPZ (BEPZA 2019).

3.7 The Tourism Industry in Bangladesh

Although Bangladesh is home to three official World Heritage sites including the Sunderbans National Park, the historic mosque city of Bagerhat and the ruins of

the Buddhist Vihara at Paharpur, the tourism industry in Bangladesh is still at a nascent stage in comparison to some other countries in the region. UNWTO (2013) states that the most popular destinations for tourists (inbound and domestic) include Dhaka, Chittagong, Cox's Bazar, Kaptai, Rangamati, Khagrachari, Bandarban, Kuakata, Bogra, Khulna, the Sundarbans, Sylhet, Rajshahi, Dinajpur and Comilla. The Bangladesh Parjatan Corporation (BPC) was created in 1972 as an autonomous body under the Ministry of Civil Aviation and Tourism (MOCAT) and is the agency officially charged with promoting and providing tourism services.

However, expansion in tourism numbers has been slow. Howalader (2015) analysed comparative data for Cambodia and Bangladesh in 1996 and 2009 which illustrates Bangladesh's lagging growth in international tourist numbers. In 1996 Bangladesh received 171,960 tourists and Cambodia hosted 96000 visitors. By 2009, tourist numbers in Bangladesh had only increased to 267,000 per annum whilst in Cambodia the annual volume of tourists had expanded to over 2 million. Table 3.8 contains an overview of key data relating to the international tourist arrivals from 36 countries in the timeframe 2009 to 2012. It can be seen that the countries of origin of the three highest numbers of tourists are India, United Kingdom and China. Table 3.8 comprises data relating to international tourists' arrivals at Bangladesh airports, Bangladesh seaports and Bangladesh highways (border crossing).

Table 3.8: Bangladesh Foreign Tourist Arrivals 2009 – 2012

| Country | 2009 | 2010 | 2011 | 2012 |
|----------------|----------------|----------------|----------------|----------------|
| India | 9,8081 | 105,262 | 145,423 | 160,240 |
| Australia | 1,3213 | 14,001 | 15,440 | 16,762 |
| Canada | 16,668 | 18,106 | 19,840 | 20,215 |
| France | 5,187 | 5,896 | 6,266 | 6,816 |
| Germany | 7,960 | 8,761 | 9,597 | 9,868 |
| Greece | 581 | 433 | 371 | 388 |
| Italy | 4,508 | 5,819 | 6,071 | 6,803 |
| Japan | 10,708 | 13,670 | 15,915 | 17,914 |
| Netherland | 4,147 | 4,666 | 4,429 | 4,413 |
| New Zealand | 1,684 | 1,542 | 1,581 | 1,669 |
| Norway | 1,443 | 1,358 | 1,567 | 1,422 |
| Sweden | 4,138 | 4,244 | 4,712 | 4,808 |
| Switzerland | 1,437 | 1,575 | 1,655 | 1,722 |
| Thailand | 5,804 | 6,027 | 6,960 | 6,210 |
| United Kingdom | 104,808 | 113,729 | 100,777 | 83,100 |
| Russia | 1,467 | 1,742 | 1,986 | 2,052 |
| Hong Kong | 2,528 | 2,999 | 1,180 | 250 |
| Indonesia | 6,297 | 3,460 | 1,180 | 2,975 |
| Iran | 591 | 770 | 818 | 737 |
| Iraq | 138 | 178 | 241 | 129 |
| Afghanistan | 346 | 653 | 391 | 405 |
| Bahrain | 1,410 | 1,553 | 671 | 319 |
| Brazil | 1,410 | 954 | 618 | 505 |
| Belgium | 1,765 | 2,104 | 2,149 | 2,186 |
| China | 15,845 | 20,636 | 28,152 | 30,944 |
| Austria | 1,211 | 1,349 | 1,327 | 1,433 |
| Jordan | 936 | 819 | 1,035 | 826 |
| Kennya | 642 | 561 | 435 | 370 |
| South Korea | 9,523 | 10,530 | 11,326 | 12,126 |
| Malaysia | 10,223 | 13,118 | 12,287 | 10,056 |
| Singapore | 0 | 5,589 | 6,272 | 6,297 |
| South Africa | 2,215 | 2,130 | 2,320 | 1,942 |
| Spain | 2,311 | 2,670 | 2,641 | 2,948 |
| Sri Lanka | 6,403 | 7,398 | 9,341 | 9,983 |
| Nepal | 8,804 | 13,472 | 11,338 | 11,445 |
| Saudi Arabia | 1,677 | 3,949 | 2,160 | 1,750 |
| Others | 124,728 | 128,783 | 152,279 | 145,999 |
| Total | 480,973 | 530,665 | 590,877 | 588,643 |

Source: Government of Bangladesh, Ministry of Information 2014

A comparative analysis of market share of the tourism industry in the SAARC nations (table 3.9) illustrates Bangladesh's less than impressive performance in terms of attracting visitors to the country.

Table 3.9: Market Share Analysis of SAARC Countries (Based on arrivals 2010)

| Country | Market Share (%) | Market Position |
|------------|------------------|-----------------|
| Bangladesh | 3.34 | 6 |
| Bhutan | 0.45 | 7 |
| India | 63.64 | 1 |
| Maldives | 8.73 | 3 |
| Nepal | 6.64 | 5 |
| Pakistan | 9.99 | 2 |
| Sri Lanka | 7.21 | 4 |
| Total | 100 | |

Source: World Bank 2015

The table 3.9 above demonstrates that Bangladesh has lagged behind most of its neighbours in South Asia in terms of attracting market share of tourism. The data indicates that neighbouring India holds the greatest market share with over two thirds of the market whereas Bangladesh ranks in sixth position among the SAARC nations. The tourist industries in Sri Lanka and the Maldives have undergone significant expansion whereas the numbers of tourists visiting Bangladesh, Nepal, Pakistan and Bhutan are relatively low.

In addition to BPC there are a range of private sector stakeholders involved in the coordination and promotion of the tourism industry including the Tour Operators' Association Bangladesh (TOAB) which has 500 corporate members, the Association of Travel Agents of Bangladesh and National Hotel Association of Bangladesh (NHAB). The tourism industry market in Bangladesh is officially segmented into six categories by the BPC. These market segments are stipulated as (i) site tourism (ii) business tourism (iii) office tourism (iv) education tourism (v) religious tourism and (vi) medical tourism.

Site tourism and business tourism combine to account for over 80 per cent of the tourism industry. Some 46 per cent of the Bangladeshi tourism market is comprised of site tourism which incorporates travel to places of scenic beauty or historical significance. Cox's Bazar is a key destination for site tourism. Business tourism comprises 42 per cent of market share and the growth of the garment manufacturing industry is a key driver for the development of this tourism segment. Office tourism (1.5 per cent market share) is a subset of business tourism but is focused on the delegates of multinationals which have offices in Bangladesh. Educational tourism including attendance at academic conferences and workshops constitute 2.4 per cent of the tourism market. Religious tourism relates primarily to visits for Muslim and Hindu festivals including the Bishwaljtema which is the largest gathering of Muslim pilgrims after the Haj to Mecca and accounts for 3.4 per cent of the total tourism figures for Bangladesh. In terms of employment the tourism industry directly supported 1,178,500 jobs in 2017 (1.8 per cent of total employment) and this is predicted to rise by 3.1 per cent annually to 1,648,000 jobs which would account for 2.1 per cent of total employment in 2028 (WTTC 2017).

GDP annual data gathered by the WTTC aims to incorporate indirect and induced economic impact of travel and tourism. The indirect impacts include wider factors such as tourism investment activity, government collective spending to support the tourism sector and domestic purchases of goods and services by the sectors directly dealing with tourists. Induced impact measures the spending by direct and indirect employees of the tourism industry (WTTC 2015). The direct contribution of travel and tourism to GDP in 2014 was BD Tk. 296.6bn (1.9 per cent of total GDP) and the total contribution of the sector to GDP was BD Tk. 627.9bn which equates to 4.1 per cent of GDP (WTTC 2015).

Visitor exports (expenditure by foreign tourists) were estimated at BD Tk 10.2 billion. An analysis of the composition of the Bangladeshi tourism industry reveals its dependence on domestic tourists who generated 97.9 per cent of direct travel and tourism GDP in 2014 compared with 2.1 per cent generated by spending by foreign tourists. In terms of market segmentation business travel (international and domestic) accounted for 22 per cent of direct travel and tourism GDP, with expenditure on leisure travel accounting for BD Tk. 389 billion (78 per cent) (WTTC 2015).

3.8 Gender and Employment in Bangladesh

In order to understand the status and participation of women in the domestic tourism industry in Bangladesh, it is useful to firstly focus on gender issues in the wider context of the Bangladeshi economy and society. Bangladesh is ranked top amongst south Asian nations for gender equality by the World Economic Forum (WEF 2017). However, an analysis of the statistics underpinning this ranking indicates a more complex situation. One of the key factors contributing to the high-ranking for-gender equality is the political participation by women. Bangladesh has the eighth lowest gender gap in political empowerment in the world. The country has had a female head of state for longer than any other country in the world and twenty per cent of parliamentary seats are held by women. However, a reduction in the gender gap in the political class does not necessarily mean there is equality for women, especially poor women in the wider workplace. Research (Kapsos 2008; Ahmed and Maitra 2010) found that overall, women's earnings were between 15 and 20 per cent lower than those of men. There has been a significant rise in female labour market participation market in Bangladesh in the past two decades. However, a closer analysis of the statistics demonstrates that this has to a large

extent been driven by the growth of the export led garment industry in major cities. The growth of the garment industry has resulted in higher levels of female participation in the workforce and over 80 per cent of workers in the garment industry are female (Machiavello et al. 2015), however Islam (2012) reports gender disparities in wages and working conditions in this sector. Equal pay for equal work is enshrined in employment law, however in practice there is evidence of significant disparity between wages and working conditions for men and women in a range of industries (ADB 2016). Research highlights a link between education levels and the gender wage gap with the largest gaps observed among illiterate workers and the second largest gap is observed among literate workers with less than a primary school education (Kalam and Al Amin 2016).

3.9 Government Tourism Development Strategies in Bangladesh

Although tourism is a relatively small component of the Bangladeshi economy, it is included as one of 32 thrust sectors with growth potential by the Bangladesh Government (Honeck and Akhtar 2014). The effectiveness of the thrust sectors initiative and tourism planning initiatives in Bangladesh overall has been the subject of critical scrutiny (Honeck and Akhtar 2014). In its review of Bangladesh's investment policy UNCTAD (2013) refers to bureaucratic regulatory structures, and inefficient practices in the public sector which leads to recurrent weakness in policy implementation and hinder investment. Evidence of the gap between government aspirations and economic realities may be evidenced by the fact that Bangladesh is ranked 176 out of 190 countries in the World Bank's Doing Business index which is benchmarked to June 2018 (World Bank 2019). Furthermore, an analysis of the rankings at regional level demonstrates that Bangladesh is ranked seventh out of eight economies in the

South Asia region, followed only by Afghanistan. The country performs particularly poorly in the index criteria in relation to starting a business and accessing electricity (seventh and eighth place rankings respectively in the regional South Asia category).

Although Bangladesh BPC included tourism development plan in the government's first Five Year Plan and in all successive Five-Year Plans, there was little progress in terms of implementation (Khondker and Ahsan 2015). The government's Sixth 5 Year Plan (2011) explicitly notes the positive impact of the tourism industry on the balance of payments and foreign exchange earnings. The plan contains an analysis which is critical of the underperformance of Bangladesh's international tourism sector and identifies a number of factors which contribute to this underperformance. These factors include inadequate allocation of funds in national budgets, lack of adequate transparency and policy coordination, inadequate infrastructure facilities, lack of modern and adequate recreation and tourist facilities, negative perceptions of the country abroad, lack of human resources in the tourism sector, visa problems and lack of foreign direct investment in the tourism industry.

In 2004, BPC launched Bangladesh Tourism Vision 2020 which set out the goal of attracting 1.3 million international visitors by 2020, a significant increase on the 0.5 million tourists predicted by UNWTO. However, there is some criticism of the lack of any concrete measures or targets in Vision 2020 to achieve its goals (Horneck and Akhtar 2014). The government of Bangladesh Planning Commission (2018) published plans for the development and expansion of the tourism industry. These plans specified eight locations identified as having significant potential for tourism development. Each area was allocated a plan to develop and enhance tourism facilities. The plans were divided into 3

categories: short term (3-5 years); mid-term (6-10 years); and long term (10-15 years). The targeted areas included Greater Sylhet Area, Greater Maymensing Area, Greater Chittagong and Cox's Bazar, Chittagong hill tracts coastal area and Islands, Greater Rajshahi Greater Khulna and Suburban area and the Greater Dhaka area.

The Bangladesh government's 7th Five Year Plan covering the timeframe 2016 to 2020 puts emphasis on the development of tourism infrastructure and support services. The authors of the plan explicitly refer to the need to emulate good practice from countries such as Malaysia and India which have succeeded in developing successful domestic and international tourism industries. The plan focuses on a number of initiatives to upgrade tourism facilities. Five of the key initiatives are listed below.

- (i) Development of three shopping malls that meets international standards in Dhaka, Chittagong and Sylhet.
- (ii) Creation of a network of eco-resorts near Sundarbans.
- (iii) Protection and promotion of archaeological sites as tourism Attractions.
- (iv) Establishment of ecotourism parks in Chittagong and Sylhet.
- (v) Training and development of tourist guides professional standards for the sector.

The development of public private partnerships is seen as the means of achievement of the tourism development goals outlined in the plan. The principal role of government bodies is presented in terms of investment in fixed infrastructure and facilitation of an environment which minimises bureaucracy for investors and tourists. It is envisaged in the 7th Five Year Plan that Investment in tourism facilities and services will come from the private sector in coordination with the BPC and Chambers of Commerce who are tasked with

responsibility for coordinating promotional and investment activities. The plan also stipulates that foreign investment will be encouraged for the roll out of the tourism development strategy. The objectives of national tourism policy have incorporated a role for tourism in poverty reduction (National Tourism Policy 2009). However, there is criticism (Farzana 2014) that the potential impact of tourism as presented in national policy is limited to employment creation.

3.10 Analysis of Poverty Indicators in Bangladesh

Historically Bangladesh has ranked amongst those nations with the highest levels of poverty in the world. However, Bangladesh's gross national income has increased over the past two decades in line with rising levels of economic growth and the government has set itself the target of achieving the status of middle-income country (MIC) by 2021. This section provides an analysis of poverty indicators in Bangladesh from 2000 – 2016. During the period 2000 – 2010, Bangladesh achieved a reduction in poverty of 26 per cent from 56.7 per cent in 1991-92 to 31.5 per cent in 2010 based on the upper poverty line (BBS 2010) with growth in labour income, both formal and informal being the dominant factor in lower poverty rates by the IMF (2013). This progress indicated that Bangladesh would meet its Millennium Development Goals (MDGs) target of halving the population living below the poverty line. Reduction in fertility rates was also a factor with resultant lower dependency ratios and higher income per-capita. There was a significant increase in real rural wages, but real urban wages grew at a slower pace. Comparative data relating to the incidence of poverty by division based on the Cost Basic Needs (CBN) method (headcount rate) in 2005 and 2010 is illustrated in table 3.10.

Table 3.10: Incidence of Poverty 2010 and 2005

| Poverty Line | Division | 2010 | | | 2005 | | |
|------------------------|------------|----------|-------|-------|----------|-------|-------|
| | | National | Rural | Urban | National | Rural | Urban |
| Lower Poverty Line (%) | National | 17.6 | 21.1 | 7.7 | 25.1 | 28.6 | 14.6 |
| | Barisal | 26.7 | 27.3 | 24.2 | 35.6 | 37.2 | 26.4 |
| | Chittagong | 13.1 | 16.2 | 4.0 | 16.1 | 18.7 | 8.1 |
| | Dhaka | 15.6 | 23.5 | 3.8 | 19.9 | 26.1 | 9.6 |
| | Khulna | 15.4 | 15.2 | 16.4 | 31.6 | 32.7 | 27.8 |
| | Rajshahi | 21.6 | 22.7 | 15.6 | 34.5 | 35.6 | 28.4 |
| | Sylhet | 20.7 | 23.5 | 5.5 | 20.8 | 22.3 | 11.0 |
| Upper Poverty Line (%) | National | 31.5 | 35.2 | 21.3 | 40.0 | 43.8 | 28.4 |
| | Barisal | 39.4 | 39.2 | 39.9 | 52.0 | 54.1 | 40.4 |
| | Chittagong | 26.2 | 31.0 | 11.8 | 34.0 | 36.0 | 27.8 |
| | Dhaka | 30.5 | 38.8 | 18.0 | 32.0 | 39.0 | 20.2 |
| | Khulna | 32.1 | 31.0 | 35.8 | 45.7 | 46.5 | 43.2 |
| | Rajshahi | 35.7 | 36.6 | 30.7 | 51.2 | 52.3 | 45.2 |
| | Sylhet | 28.1 | 30.5 | 15.0 | 33.8 | 36.1 | 18.6 |

Source: Household Income and Expenditure Survey (HIES 2005; 2010) and Bangladesh Bureau of Statistics (BBS 2005; 2010)

Although the size of the agriculture sector reduced slightly, it still accounted for 50 per cent of the workforce and 45 per cent of total household income (BBS 2010). During the period 2000 to 2010 GDP in Bangladesh increased by an average of 6 per cent per annum (BBS 2012). Over the same period poverty rates experienced an average annual decline of 1.74 per cent (BBS 2012). Despite reductions in poverty overall in Bangladesh, a closer analysis indicates disparities at a regional level. An analysis of statistics from the Bangladesh Household Income and Expenditure Survey (HIES 2010) demonstrates that progress in poverty reduction was uneven across the nation's seven administrative divisions with the North West seeing an increase in poverty rates. There was a slight reduction in poverty headcount in Chittagong, with sharper declines in Barisal, Dhaka and Sylhet divisions.

During the period 2010 to 2016 poverty as measured in terms of the international extreme poverty line decreased from 18.5 per cent in 2010 to 13.8

per cent in 2016. Using the national upper poverty line as a measure in 2010 almost a third of Bangladeshis lived in poverty and by 2016 this figure was less than twenty-five per cent. A rural – urban divide may be observed in the poverty reduction trends from 2010 to 2016. Rural poverty reduction accounted for 90 per cent of all poverty reduction in that timeframe. However, in urban areas in that period the rate of extreme poverty barely decreased, moving from 7.7 per cent in 2010 to 7.6 per cent in 2016 (World Bank 2017). This presents a significant problem for policy makers given the rapid rise in the rate of the urban population in Bangladesh.

An analysis of poverty reduction data spanning the period 2005 to 2016 indicates that there has been a deceleration in poverty reduction. The Bangladeshi economy experienced growth rates in GDP at an average annual rate of 6.5 percent per year between 2010 and 2016. However, there was not a corresponding increase in the rate of poverty reduction. Data for the period 2005 to 2010 demonstrates an annual decline in the national poverty rate of 1.7 percentage points while equivalent data for the period 2010 to 2016 reveals a decline of 1.2 points (World Bank 2017). An analysis of trends indicates a deceleration in poverty reduction and a difference in rates of poverty reduction in urban and rural areas. A reason for the decrease in the rate of poverty reduction put forward by the World Bank (2017) relates to slower and more unequal household consumption. Poorer households experienced slower consumption growth than richer households and most measures of inequality increased from 2010 to 2016 whereas they had fallen in the previous five years. During 2010 to 2016 average annual consumption growth fell from 1.8 per cent to 1.4 per cent with slower consumption disproportionately impacting poorer

households. There was an increase in terms of most measures of inequality during this time whereas they had declined in the previous five years.

The Centre for Policy Dialogue (CPD) analysis of data from the HIES conducted from April 2016 to March 2017 notes some trends relating to poverty alleviation. An analysis of the poverty head count rate as measured by the CBN method indicated a reduction from 31.5 per cent in 2010 to 24.3 per cent in 2016. A comparative analysis of data relating to rural and urban poverty over the same timeframe reveals that rural poverty declined from 35.2 per cent to 26.4 per cent and urban poverty reduced from 21.3 per cent to 18.9 per cent. It can be seen that there is consistent higher incidence of poverty in rural areas (BBS 2017). An analysis of the state of the Bangladesh economy (CPD 2018) poses questions about the benefits of economic growth in relation to poverty and employment estimates, table 3.11 illustrates the deceleration in poverty reduction which is concurrent with economic growth. Inequality in household incomes has also increased during the time frame 2005 to 2016.

Table 3.11: Poverty Reduction and Economic Growth

| Average annual | 2000-2005 | 2005-2010 | 2010-2016 |
|--------------------------------------|-----------|-----------|-----------|
| GDP growth (%) | 5.1 | 6.1 | 6.5 |
| Employment growth (%) | 3.3 | 2.7 | 1.9 |
| Poverty reduction (percentage point) | 1.8 | 1.7 | 1.2 |

Source: Asian Development Bank 2018

Analysis by CPD (2018) illustrated in table 3.12 indicates that poor households in the bottom 5 and 10 per cent deciles have experienced significant decline in distribution of monthly (nominal) household income over the timeframe from 2005 to 2016. In contrast, households in the higher deciles particularly in the top ten per cent experience growth in household income. Research (Bhattacharya et al. 2017) based on 2005 and 2010 HIES data indicates that poor households'

share of total wealth (in terms of value) declined at national level in both rural and urban areas. This trend is supported by the increase in the value of the Gini coefficient, which at 0.74 reflects a high level of inequality.

Table 3.12: Decile Distribution of Average Monthly Household Income (BD Tk.)

| Household distribution | 2005 | | | 2010 | | | 2016 | | | Growth (%) | | |
|------------------------|--------|--------|--------|--------|--------|--------|--------|--------|---------|------------|-------|-------|
| | N | R | U | N | R | U | N | R | U | N% | R% | U% |
| Bottom 5 | 1,109 | 1,073 | 1,402 | 1,791 | 1,698 | 2,504 | 733 | 668 | 1219 | -59 | -60.7 | -51.3 |
| Decile-1 | 1,441 | 1,371 | 1,883 | 1,883 | 2,152 | 3,262 | 1,610 | 1,415 | 2,618 | -29 | -34.2 | -19.7 |
| Decile-2 | 2,348 | 2,212 | 3,160 | 3,696 | 3,406 | 5,091 | 4,512 | 4,006 | 6,747 | 22.1 | 17.6 | 32.5 |
| Decile-3 | 2,953 | 2,767 | 4,049 | 4,706 | 4,332 | 6,508 | 6,442 | 5,782 | 9,432 | 36.9 | 33.5 | 44.9 |
| Decile-4 | 3,602 | 3,303 | 4,823 | 5,740 | 5,239 | 8,254 | 8,180 | 7,304 | 11,260 | 42.5 | 39.4 | 36.4 |
| Decile-5 | 4,293 | 3,919 | 5,922 | 6,899 | 6,204 | 10,396 | 9,934 | 8,853 | 13,336 | 44.0 | 42.7 | 28.3 |
| Decile-6 | 5,165 | 4,650 | 7,094 | 8,403 | 7,381 | 12,587 | 11,975 | 10,616 | 16,179 | 42.5 | 43.8 | 28.5 |
| Decile-7 | 6,288 | 5,650 | 8,925 | 10,400 | 8,982 | 15,322 | 14,542 | 12,605 | 18,842 | 39.8 | 40.3 | 23.0 |
| Decile-8 | 7,967 | 7,003 | 10,651 | 13,201 | 11,095 | 19,556 | 17,747 | 15,730 | 23,671 | 34.4 | 41.8 | 21.0 |
| Decile-9 | 10,855 | 9,405 | 15,150 | 14,993 | 26,492 | 23,662 | 23,662 | 20,684 | 30,034 | 29.3 | 38.0 | 13.4 |
| Decile-10 | 27,112 | 20,674 | 4,2982 | 41,141 | 32,697 | 57,284 | 60,846 | 46,522 | 93,509 | 47.9 | 42.3 | 63.2 |
| Top 5 | 38,795 | 28,074 | 6,3552 | 56,500 | 44,246 | 77,070 | 88,941 | 64,762 | 144,958 | 57.4 | 46.4 | 88.1 |

Source : Centre for Policy Dialogue (CPD 2018), (N= National, R= Rural, U= Urban)

3.11 Poverty Alleviation Strategic Plans in Bangladesh

As part of its strategic goal to achieve middle income country (MIC) status, the Bangladeshi government published its Vision 2021 strategy paper and the associated Perspective Plan 2010-2021. These documents specify a series of development targets that must be achieved including the attainment of a poverty head-count rate of 14 per cent by 2021. This section outlines initiatives at government level to alleviate poverty and the role of Five-Year Plans, Poverty Reduction Strategic Plans (PRSPs) and Social Safety Net Programmes (SSNPs). In addition, the role of microfinance initiatives in poverty reduction in Bangladesh is examined. Since the foundation of the independent state of Bangladesh in 1973, poverty reduction has been a key strategic objective which was integral to the development strategies of successive administrations. Bangladesh introduced its first five-year development plan in 1973.

In July 2005 Bangladesh was obliged to adopt the PRSP methodology in order to gain access to the World Bank's Development Support Credit and the IMF's Poverty Reduction and Growth Facility (PRGF) (Khatun et al. 2014). PRSPs describe the country's macroeconomic, structural, and social policies in support of growth and poverty reduction, as well as associated external financing needs and major finance sources (IMF 2013). The PRSP process continued up until 2010. During this period, the first Interim PRSP, the first PRSP (Unlocking the Potential) and the second PRSP (Moving Ahead) were prepared and implemented (2003-2010). However, a decision was made to revert to the five-year development plan in 2011. A criticism of the PRSP approach was based on the view that the theoretical underpinning of this approach was based on neo liberal market economics where the role of state in development is minimised (Kamruzzaman 2016). The Rural Development and Cooperatives Division

(RDCCD) implements short and medium-term poverty alleviation action plans using PRSPs as a guiding framework. The RDCCD also coordinates a number of flagship poverty reduction projects including Ekti Bari Ekti Khamar (One House One Farm) project which aims to develop a small savings model in lieu of microcredit to create permanent capital for the poor (World Farmers Association 2014).

3.11.1 Social Safety Net Programmes (SSNPs)

The first phase of the PRSP (Unlocking the Potential) placed emphasis on the role of social safety net programmes (SSNPs) in poverty reduction. The key SSNPs are classified under four headings (i) employment creation programmes (ii) programmes related to education of children and young people (iii) health programmes and (iv) initiatives to assist people affected by natural disasters. These programmes can be categorised into two types related to the method of benefit transfer. Food transfers are the basis of the Vulnerable Group Development Programme, Vulnerable Group Feeding Programme and the Food for Work Programme. Other SSNPs such as Primary Education Stipend Programme, Female Secondary School Assistance Project, Old Age Allowance and Rural Maintenance Programme are based on cash transfers (Barkat-e-Khuda 2011). The scope of the SSNPs incorporates addressing the special needs of target groups within poor and underprivileged groups including physically challenged children and adults and, socially excluded communities in tribal areas. Expenditure on SSNPs in the financial year 2016-17 amounted to 2.09 percent of GDP (Ministry of Finance, Government of Bangladesh 2017).

In addition to the mainstream SSN programmes, different ministries manage a range of other social protection projects. Examples cited in the 6th Five Year Plan include Grihayan Fund (fund for housing the homeless), Ghore Fera

(rehabilitation of slum dwellers), Ekti Bari Ekti Khamar (rehabilitation and creation of alternative employment for people engaged in begging). A fund for reducing poverty and generating employment under the Ministry of Women and Children Affairs. Ashrayan 2 (Poverty Alleviation and Rehabilitation) has been operating since 1997 with the aim of supporting landless and homeless families facilitating economic development through the promotion of different types of income generating activities such as handicrafts, poultry and pisciculture. It can be noted that within key SSNPs tourism is not explicitly referenced as a potential source of employment or income generation. There is criticism (Barkat-e-Khuda 2011) that the focus of SSNPs is largely rural based whilst Bangladeshi society is undergoing rapid urbanisation.

3.11.2 Microfinance Initiatives

Schreiner and Colombet (2001) define microfinance as an attempt to improve access to small deposits and small loans for poor households neglected by mainstream financial institutions. Khandker (2005) observes that Bangladesh is recognised as a pioneer in the implementation of microfinance to address poverty reduction. The evolution of microfinance as a tool for poverty alleviation globally is generally accredited to the Bangladeshi Nobel laureate Mohammed Yunus. Yunus began by providing small loans to basket-weavers and bamboo furniture makers before establishing Grameen Bank in 1983, with the aim of providing access to loans to impoverished communities (Churchill et al. 2016). In 2006 the Microcredit Regulatory Authority (MRA) was formed in order to regulate the sector to ensure transparency and accountability of the microfinance institutions. In 2014, it was estimated that over 700 registered microfinance institutions (MFIs) were providing loan services to 33 million people (MRA 2015).

The MFI sector is diverse with a range of institutions including government agencies, local and international NGOs and charitable foundations. Key players in this sector include Bangladesh Rural Development Board (BRDB), Bangladesh Rural Advancement Committee (BRAC), Grameen Bank, Palli Karma Sahayak Foundation (PKSF), the Shakti Foundation, Association for Social Advancement (ASA) and Basic Unit for Resources and Opportunities Bangladesh (BUROB). Microfinance has been credited with contributing to the economic empowerment of women (Mahmood et al. 2015). Research (Mazumber and Lu 2015) suggests positive changes are consistently higher in non-governmental microfinance programmes. Significant claims have been made about the impact of microfinance on poverty reduction in Bangladesh (Pitt and Khandker 1996; Imai and Azam 2012; Khandker and Samad 2013). However, literature on this topic indicates that there is some debate about the real impact on poverty alleviation. Roodman and Morduch (2014) conclude that there is a lack of evidence of a strong causal link between access to microcredit and poverty reduction. Research (Duvendack et al. (2011), Stewart et al. (2010) and van Rooyen et al. (2012) cited by Churchill et al. (2016) suggests no meaningful impact of microfinance in poverty reduction.

3.12 Economy and Tourism in Cox's Bazar

Cox's Bazar town and tourist resort is located in Cox's Bazar district in the district of Chittagong. Cox's Bazar has been branded as the tourism capital of Bangladesh based on the fact that it is the most popular destination for domestic tourists in the country (Amin and Jahan 2016). Located 400 kilometres from the capital, it has air and road connections to the rest of the country. Cox's Bazar's main attraction for tourism is its claim to have the world's longest

uninterrupted natural beach at 120 kilometres (UNWTO 2015). Cox's Bazar was primarily a fishing port until the 1990s when it underwent a transition to a tourism-based economy (Anwar 2012). Cox's Bazar also known as Panowa (yellow flower) is a popular beach resort in its own right but it is also a base for excursions to the coral island of St Martin's also known locally as Narical Gingira (Coconut Island) which is located 6 kilometres south of Cox's Bazar. Other local attractions include Himchari, Teknaf, Inani beach, a major Buddhist temple at Ramu) and Moheskhali and Sonadi.

Population growth in Cox's Bazar, has seen one of the fastest growing rates of in Bangladesh in recent years. This rapid expansion has been driven by growth in tourism and related industries (Rahman 2010; Hossain et al. 2012). The greater Chittagong region in general and Cox's Bazar area in particular, contain a significant number of indigenous communities and refugees. The Chakma tribal group is the largest ethnic minority group in Bangladesh and is represented in Cox's Bazar. The second largest ethnic minority community in the area is the Marma people. The Tanchangya tribal people are also present in the Chittagong Hill Tract and a community lives in the Cox's Bazar district. The Chaka and the Tanchangya are traders and the women in these communities are frequently skilled in handicrafts. The Cox's Bazar district is also home to a significant refugee community. Since the 1970s approximately 500,000 Rohingya refugees have fled persecution in Myanmar and relocated to Cox's Bazar. It is estimated by the United Nations Office for the Coordination of Humanitarian Affairs (UNOCHA 2018) that 32,000 registered Rohingya live in two United Nations refugee camps near Cox's Bazar.

The range of tourism activities offered in Cox's Bazar resort are diverse and include hiking and trekking in the local hill areas, water sports and including

swimming and surfing and cultural and heritage tours. Anwar (2012) notes that local tribal festivals and traditions are part of the attraction of Cox's Bazar for domestic tourists. Indigenous culture has been officially recognized as a tourist attraction by the Bangladesh government. However, there is a lack of research on the impact of tourism on indigenous communities in the context of addressing economic and social marginalization and poverty alleviation (Islam and Carlsen 2016). Cox's Bazar's economy is heavily dependent on the tourism industry and associated sectors. 8,600 workers are directly employed in over 220 hotels, motels, and guest houses, 154 restaurants, and 54 tour operators (Mamun et al. 2013).

In July 2015, the government of Bangladesh approved a draft of the Cox's Bazar Development Authority Act 2015 (COXDA) which has the aim of developing the district town into a planned tourism city. The key challenges identified by the government in developing a tourism city are unplanned construction and environmental degradation. In 2018 BEZA announced plans for three major tourism development projects specifically Naf Tourism Park, Sabrang Tourism Park and Sonadia Ecotourism Park, which are all located in the district of Cox's Bazar. The plans project to generate USD 2 billion for the economy and the creation of two hundred thousand new jobs (BEZA 2018). In order to encourage investment in these projects, the government is offering 100 per cent tax exemption for the first 10 years, followed by 70 per cent and 30 per cent tax exemptions in the eleventh and twelfth year, respectively. The creation of Sonadia, Eco Tourism Park is focused on an island located in Maheshkhali and 37,000 acres of land comprised of Sonadia and other adjacent islands. Plans for the park include marine parks, museums, marine cruises, water sports and small retail outlets.

There are also plans to make a 1.25 kilometre area inaccessible to the public in an effort to protect the ecosystem. The proposed tourism park in Sabrang will comprise hotel complexes, eco-tourism accommodation, a floating jetty, an aquarium, sea cruises and a floating restaurant. The proposed Naf Tourism Park is will be the first river-based tourism park in Bangladesh constructed on 271 acres and located adjacent to the Cox's Bazar-Teknaf highway. The published plans indicate that the government will cover the cost of developing the park which will be sold to domestic and foreign private investors on completion (Islam 2018).

3.13 Poverty in Cox's Bazar

Bangladesh is divided into 8 divisions and 64 districts and Chittagong division is divided into 11 districts, one of which is Cox's Bazar (table 3.13). According to the latest available statistics (World Bank 2016) Chandpur district has the highest level of poverty headcount ratio (51 per cent) within Chittagong and the highest (30.3 per cent) extreme poverty headcount ratio. Cox's Bazar ranks as the fourth highest district in terms of poverty headcount ratio and fifth highest in terms of extreme poverty headcount ratio.

Table 3.13: Chittagong Division Poverty Levels 2016

| Chittagong Division | | | |
|---------------------|---------------------------|-----------------------------------|------------|
| Districts | Poverty Headcount Ratio % | Extreme Poverty Headcount Ratio % | Population |
| Chittagong | 11.5 | 4.0 | 7,633,760 |
| Cox's Bazar | 32.7 | 16.2 | 2,285,320 |
| Rangamati | 20.2 | 6.8 | 602,740 |
| Bandarban | 40.0 | 21.6 | 391,860 |
| Khagrachhari | 25.5 | 10.1 | 613,080 |
| Feni | 25.8 | 14.5 | 1,441,600 |
| Lakshmipur | 31.2 | 18.0 | 1,726,780 |
| Comilla | 37.9 | 21.1 | 5,390,960 |
| Noakhali | 9.6 | 3.4 | 3,109,820 |
| Brahmanbaria | 30.0 | 15.0 | 2,848,260 |
| Chandpur | 51.0 | 30.3 | 2,406,900 |

Source: Bangladesh Interactive Poverty Maps, World Bank 2016

Table 3.13 above, illustrates the position of Cox's Bazar relative to the other districts in Chittagong Division in relation to poverty indicators.

Research (Lemma et al 2018) indicates that Cox's Bazar has an overall 33 per cent poverty headcount ratio. Within Cox's Bazar there is variation in poverty levels between upazilas. This variation within the 8 upazilas of Cox's Bazar is illustrated in table 3.14. This research was conducted in Cox's Bazar Sadar upazila which has the lowest poverty headcount ratio and extreme poverty headcount ratio in the district. However, these poverty headcount ratios are not insignificant with rates at 26.1 per cent and 12.2 per cent, respectively.

Table 3.14: Cox's Bazar District, Upazila Poverty Rates 2016

| Cox's Bazar District | | | |
|----------------------|---------------------------|-----------------------------------|------------|
| Upazilas | Poverty Headcount Ratio % | Extreme Poverty Headcount Ratio % | Population |
| Chakaria | 28.4 | 13.2 | 472,820 |
| Cox's Bazar Sadar | 26.1 | 12.2 | 457,920 |
| Kutubdia | 31.0 | 13.7 | 124,820 |
| Maheshkhali | 40.2 | 21.3 | 319,100 |
| Ramu | 34.3 | 17.8 | 270,320 |
| Teknaf | 38.1 | 19.7 | 263,200 |
| Ukhia | 37.8 | 20.1 | 207,080 |
| Pekua | 30.9 | 14.3 | 170,060 |

Source: Bangladesh Interactive Poverty Maps, World Bank 2016

In recent years Cox's Bazar has mainly come to the world's attention due to the Rohingya refugee crisis. Over 728,000 Rohingya refugees fleeing severe persecution in Myanmar have arrived in Cox's Bazar since 2017. These refugees are not included in official poverty headcount figures. The majority are accommodated in refugee camps in the south of Cox's Bazar in Teknaf and Ukhia. The impact on the economy and has been significant (Lemma et al 2018; World Bank 2018) and has put pressure on wages and prices of locally sourced commodities. Some 50 per cent of local households and 80 per cent of poor

households in Cox's Bazar derive income from daily wages (World Bank, 2018). Consequently, increased competition in the labour market from economically vulnerable refugees who traditionally engage in unskilled work has potentially serious consequences for poor households in the host community. The World Bank (2018) estimates indicate that a 25 per cent fall in daily wage rates would create a 50 per cent increase in poverty and a 50 per cent decrease in the daily rate would double the poverty rate for households in Cox's Bazar. However, it has been argued (Cookson 2017) that the tourism industry in Cox's Bazar could benefit economically from the arrival of the large number of humanitarian aid workers associated with the Rohingya refugee crisis.

3.14 Chapter Summary

This chapter has set out the economic and political context in which the tourism industry in Bangladesh operates. The Bangladeshi economy is in the process of major transition from one dependent on agriculture to one in which the manufacturing and services sectors play an increasingly important role. This chapter analysed economic development strategies in Bangladesh as formulated in a series of national development plans including the designation of tourism as a thrust sector. Bangladesh has achieved high levels of economic growth for successive years and has made significant progress in poverty reduction. This has resulted in an increase in the number of people with the financial capability to engage in tourism (Akter 2016; Amin 2017). However, in recent years increased economic growth has been accompanied by a deceleration of poverty reduction rates for poor households. This chapter addressed the range of poverty reduction strategies developed at national level (Khatun et al. 2014; Kamruzzaman 2016) and it can be concluded that tourism was allocated a very limited role in the implementation of these policies. This

chapter presents a justification for the selection of Cox's Bazar as the research area for this study. This selection is based on Cox's Bazar's status as the most popular tourism destination in Bangladesh (Rahman 2010; Hossain et al. 2012) and an analysis of poverty indicators in the resort and surrounding areas (Lemma et al. 2018).

CHAPTER 4: RESEARCH DESIGN, METHODOLOGY AND METHODS

4.1 Introduction

This chapter outlines the research methodology used to gather evidence to address the research objectives and questions. The research is based on an examination of the contribution of tourists' expenditure to poor households' incomes. In order to address the research questions and objectives, an analysis of the links in the tourism value chain in Cox's Bazar is conducted so as to identify contributions to, and leakages from, the local economy, and the contribution to poor households' incomes. Firstly, the philosophical foundation underpinning the research methodology is discussed, including research paradigms and philosophical dimensions. The design of the research is explained including the decision to use a quantitative methodology to achieve the research objectives. Data collection procedures are provided including sampling techniques and the processes involved in the analysis of data gathered during fieldwork research. The next section of this chapter outlines in detail the process of data analysis. The data analysis encompasses calculation of (i) the share of total tourist expenditure allocated to each actor, (ii) each actor's direct and indirect contributions to household income, (iii) the aggregate contribution of all tourist expenditure, and (iv) the proportion of this contribution which reaches poor and non-poor households. The chapter concludes by outlining research limitations and challenges experienced during the fieldwork data collection in Cox's Bazar and compliance with ethical guidelines.

4.2 Research Philosophy and Approach

In this section, the philosophical perception underpinning the research is outlined and the epistemological and ontological positions of the research are stated. The

research philosophy adopted will contribute to the research strategy and methods (Crotty 1998). Johnson and Clarke (2006) cited by Saunders et al. (2012) note the importance of the researcher's need to be aware of the relationship between a philosophical commitment in one's conduct and comprehension of the research.

Table 4. 1: Research Philosophical Dimensions and Research Methods

| Philosophical Dimensions and Research methods | Research Paradigms | | |
|--|---|---|---|
| | Positivism | Interpretivism | Pragmatism |
| Ontology- the position on the nature of reality. | External, Objective and independence of social actors. | Socially constructed, subjective, may change, multiple. | External, multiple, view chosen to best achieve an answer to the research question. |
| Epistemology- the view of what constitutes acceptable knowledge. | Only observable phenomenon can provide credible data, facts. A focus on causality and law-like generalisations, reducing phenomena to the simplest elements. | Subjective meanings and social phenomena. Focus upon the details of the situation, the reality behind these details, subjective meaning and motivating actions. | Either or both observable phenomena and subjective meanings can provide acceptable knowledge dependent upon the research question. Focus on practical applied research, integrating different perspectives to help interpret the data. |
| Research Methodology -the model behind the research process. | Quantitative. | Qualitative. | Quantitative and Qualitative (mixed or multi-method design). |

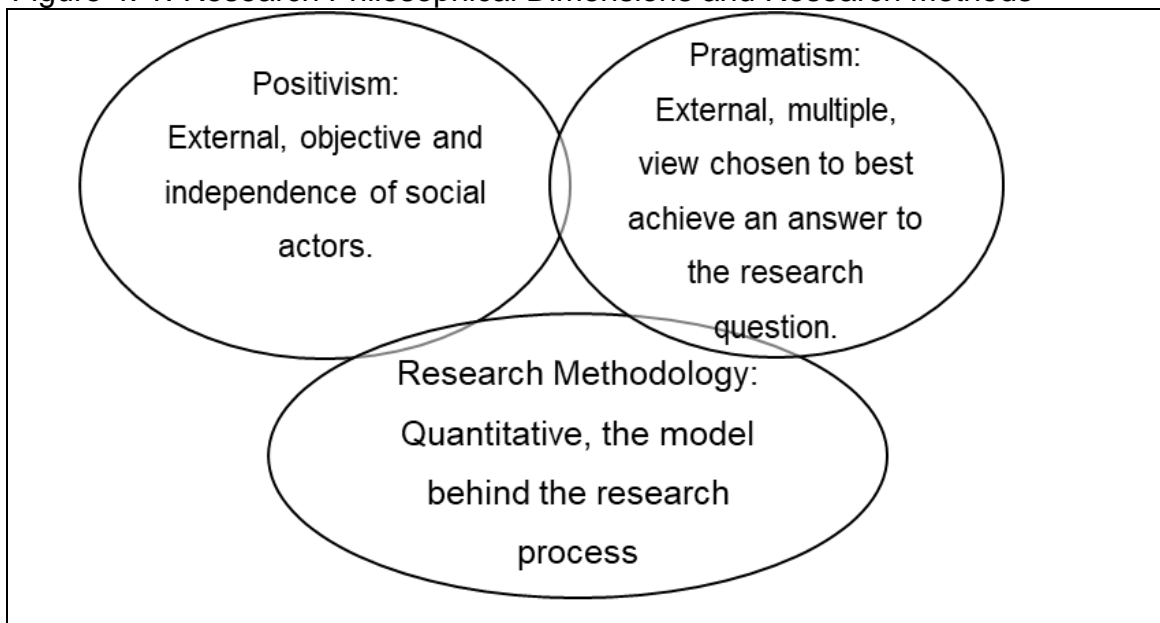
Source: Adapted from Wahyuni 2012

A comparative analysis of three research philosophies is presented in table 4.1 above.

One definition of epistemology is the theory of knowledge and understanding, especially with regard to methods, validity, and scope, and the distinction between justified belief and opinion (*Oxford English Dictionary* 2015). In terms of

epistemology and ontology, this research is based on a positivist approach (Denzin and Lincoln 1994). Research underpinned by a positivist approach frequently employs statistical and mathematical techniques and adheres to specifically structured research techniques (Carson et al. 2001). Positivist research is based on objectivity and may be characterised by the use of consistently rational and logical approaches to research (Strauss and Corbin1990; Carson et al. 2001). The research paradigms, philosophical dimensions, and research methods underpinning this research are illustrated in figure 4.1.

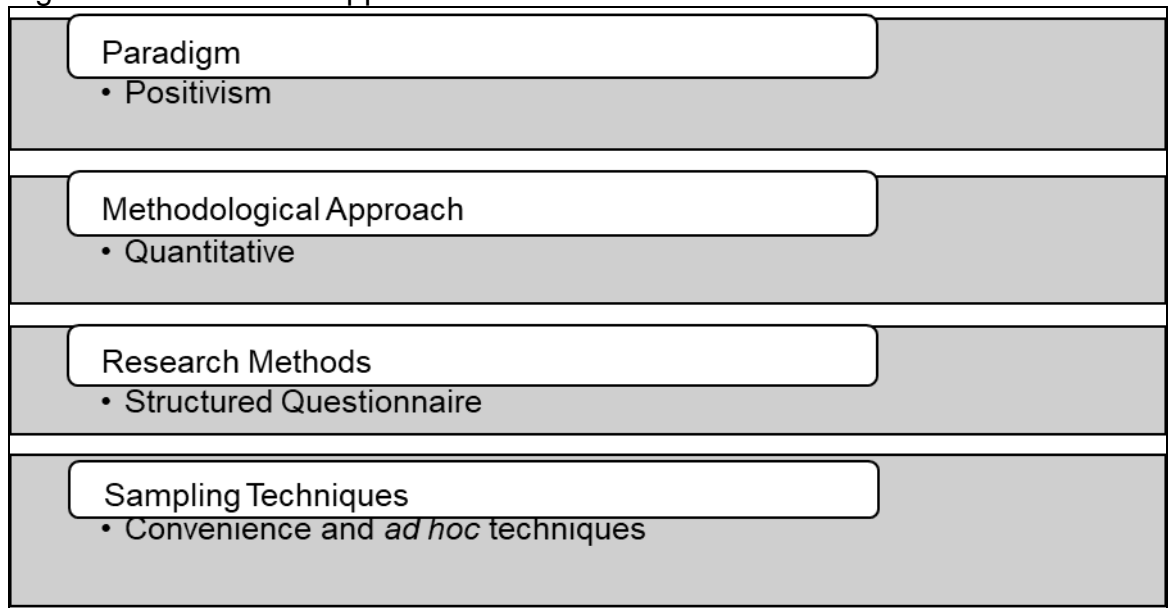
Figure 4. 1: Research Philosophical Dimensions and Research Methods



Source: Author's own work based on Saunders et al. 2009, adapted from Wahyuni 2012

The research paradigm and selection of methodological approach for this research are illustrated in figure 4.2. In addition, the research methods and sampling techniques are specified.

Figure 4. 2: Research Approaches



Source: Author's Own Work 2017

4.3 Research Methodology

Mitchell and Ashley (2009) cited by Thomas (2012) note that the literature relating to the contribution of tourism on poverty alleviation encompasses a varied range of different research methodologies and measurement tools which have frequently been developed in isolation from each other. The selection of the methodology for measuring tourism's contribution to an economy will be determined by the aim and objectives of the study, time constraints, availability of resources, and the structure of the economy to be studied (Fletcher 1989).

This research is based on quantitative methods underpinned by the four major characteristics associated with this approach which are credibility, transferability, dependability, and conformability (Guba 1985). An important characteristic of quantitative research is the fact that data aggregation is facilitated on the basis of responses by a large number of research participants to a limited range of questions (Patton 1990). A key difficulty for researchers in

this field is the limitation in terms of access to reliable data and the extent of the informal economy which create difficulties in relation to the measurement of the contribution of tourism on poverty alleviation (Thomas 2012). In relation to this research, the Bangladesh Tourism Board does not maintain any TSA statistics. Indeed, it can be noted that overall, the Bangladesh tourism industry has limited data available at national, regional, or local levels (Lemma et al. 2018). In addition, within the tourism value chain in South Asia generally and specifically in Bangladesh, there is a high level of participation by actors in the informal economy (Vanek et al. 2012). The issues associated with the lack of reliable data in the context of measuring progress towards sustainable development goals are highlighted by The Centre for Policy Dialogue Bangladesh (2015) which notes that data for several important indicators are unavailable at the level of disaggregation needed and makes the following comment about the lack of viable data available to input into social and economic research in Bangladesh.

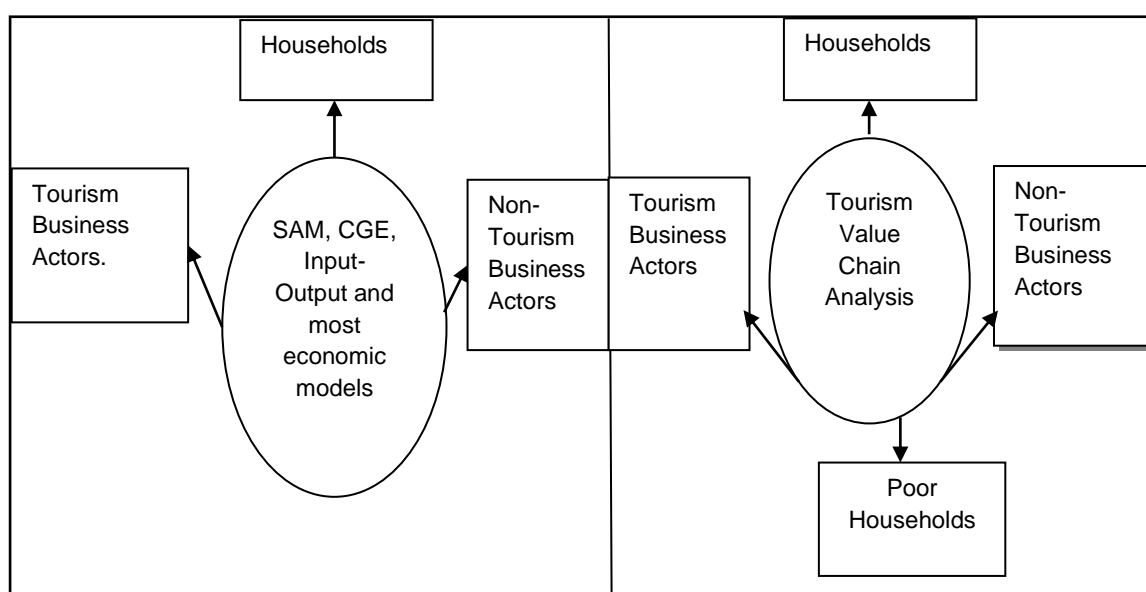
“Available data in Bangladesh are of variable quality. They often suffer from a lack of accuracy and reliability, timeliness and punctuality, accessibility and clarity, and coherence and comparability. There is a need to improve overall data quality.”

4.3.1 Value Chain Analysis Selection

This research applies value chain analysis in the context of Cox's Bazar's in order to identify both the net benefits to poor households' incomes and the leakage of tourism revenue from the local economy. Value chain analysis has been employed as part of the research methodology as it has been demonstrated to examine a range of interrelated tourist activities and the contribution to local population groups. Through analysis of links in the value chain and the range of activities in each link, it is possible to identify those

activities which contribute to gains for local communities or those which contribute to the leakage of resources (Gereffi and Memedovic 2003). In addition, value chain analysis may be employed to analyse expenditure allocated on different tourist services and provides insight into the distribution of benefits from tourism on local communities and specific stakeholders (Kaplinsky 2000). Figure 4.3 illustrates the rationale for the selection of value chain analysis as a method for this research and highlights the difference in emphasis between the macroeconomic emphasis of methods such as SAM, CGE, and Input-output methods, and the Value Chain Analysis method which incorporates the contribution to poor households.

Figure 4. 3: Rationale for Selection of Tourism Value Chain Analysis



Source: Author's Own Work, adapted form Mitchell and Phuc 2007

4.3.2 Research Setting Area

Vanegas et al. (2015) suggest that in the context of researching poverty alleviation, it may not be useful to conduct research into a large number of countries as this may not provide accurate information about the specific factors contributing to poverty reduction in a particular country. This research focuses solely on the tourism resort of Cox's Bazar in the district of Chittagong. There is

literature relating to the opportunities and challenges faced by the tourism sector in Bangladesh (Akteruzzaman and Ishtiaque 2001; Siddique 2006; Amin 2017). However, there has been relatively little research to date analysing the relationship between the tourism value chain and poverty reduction in Bangladesh (Honeck and Akhtar 2014). The researcher has knowledge of local customs and can speak the local language (Bengali). The Cox's Bazar conurbation was selected as the specific geographic study area because it is the most popular resort for domestic tourism in Bangladesh and has a high level of dependency on employment in the tourism sector by people from economically vulnerable households (Amin 2017). The main attractions for tourists to Cox's Bazar are the three beaches of Kolatoli, Suganda, and Laboni, which were the locations for the administration of questionnaires for tourists. Consequently, the majority of accommodation and food service providers are also located within proximity of these three beaches. Research was also conducted in the villages in a five-kilometer radius where households of vendors, workers, and tuk tuk and rickshaw drivers were located. Some research was also conducted with wholesalers in markets (Jinuk market, Zamzam market, and Nazirar Tek) in the vicinity of Cox's Bazar.

Map 4. 1: Map of Cox's Bazar, Bangladesh.



Source: The Daily Star newspaper, Bangladesh 2018

4.4 Data Collection Process

Andriotis (2002) classifies the data collection process under three headings observation, direct communication, and secondary data. This research incorporates direct communication using questionnaires combined with secondary data. The Overseas Development Institute (ODI 2009) proposes a three-stage framework for value chain analysis comprised of nine steps incorporating a situational diagnostic, the scoping and prioritisation of opportunities, and intervention planning including eight steps. For the purposes of this research, this process was adapted, omitting the intervention phase because this was not in line with the research objectives. A diagram of the amended value chain analysis process is reproduced in table 4.2.

Table 4. 2: Steps Involved in Value Chain Diagnosis

| Phase | Step | Priority | Reason |
|---|--------|--|---|
| Phase 1 Diagnosis of the case study situation. | Step 1 | <ul style="list-style-type: none"> • Preparation. • To develop a conceptual framework of value chain analysis from the literature review. • List the beaches area in Cox's Bazar. • List the Government tourism authorities. • List all actors within the tourism value chain, • List all targeted households near to the beaches area. • Assess the time framework of data collection. | To understand and define the destination before collecting the data. |
| | Step 2 | <ul style="list-style-type: none"> • Map the big picture Business actors (Hotels, Restaurants, etc.), Households in Cox's Bazar and the tourism market suppliers. | To understand the overall context in which the tourism industry operates in Cox's Bazar. |
| | Step 3 | <ul style="list-style-type: none"> • Map the tourism value chain (Cox's Bazar 14 actors) To finalise the actors, households, tourists, and suppliers participating within the Tourism Value Chain in Cox's Bazar. | To develop a detailed understanding of the operation of the tourism value chain and identification of research samples of 14 actors. |
| | Step 4 | <ul style="list-style-type: none"> • Fieldwork Questionnaires Conduct fieldwork interviews with each actor in the chain. | Field Work Data Collection from 10 July to 30 July 2017, to provide data and insights for Steps 5 to 7. |
| | Step 5 | <ul style="list-style-type: none"> • Tracking tourists' expenditure. • Tracking 12 business actors' revenues, total cost, net profit, and direct and indirect contribution to the Cox's Bazar households. • Households and Poverty Headcount Ratio Estimate how expenditure flows through the chain and how much accrues to the households and poor households. | To track tourists' expenditure through the tourism value chain to the poor households and assess the extent to which tourism value chain is pro-poor. |
| Phase 2 Scope and prioritise opportunities | Step 6 | <ul style="list-style-type: none"> • Challenges and Opportunities Identify the areas of linkages and | To identify the areas for change from step 5 and to ensure |

| | | | |
|--------------------------------|--------|--|---|
| | | leakages in the tourism value chain. | steps 6 to 7 are focused on priority areas. |
| | Step 7 | <ul style="list-style-type: none"> Analysis of Tourism Value Chain in Cox's Bazar Analyse the barriers, options, and partners in the tourism value chain in order to identify ways to increase net benefits to poor households. | To input into recommendations. |
| Phase 3 Recommendations | Step 8 | <ul style="list-style-type: none"> Further Recommendations Operational and strategic at local and national level. | To contribute to research and strategy relating to tourism and poverty alleviation. |

Source: Author's Own Work 2018 adapted from Mitchell et al. (2009) and the Overseas Development Institute (2009)

4.4.1 Preparation for Fieldwork Research and Data Collection

The achievement of the research aims, and objectives is contingent on targeting an appropriate sample (Baruch et al. 2004). The first stage involved researching secondary data incorporating reports and statistics; information from international organisations and national and local bodies in Bangladesh including the Ministry for Planning and the Centre for Policy Dialogue. This secondary data included data on poverty indicators and progress towards UN Millennium Development Goals (MDGs), statistics on tourism in Cox's Bazar, and policy documents on strategic plans for tourism development.

Research incorporating analysis of the contribution of the tourism value chain to poor households involved a detailed examination of backward and forward linkages (Trejos and Chiang 2009). The primary data is a key input into the value chain analysis. Data was gathered through questionnaires with key participants at each stage of the tourism value chain. Specifically, the quantitative techniques used in this research comprise convenience and *ad hoc* techniques. The format of the questionnaires was structured and contained

close-ended questions. The completion of questionnaires was administered by verbally asking questions of respondents and recording their responses.

The first step in the process of preparation for data collection was to ensure that the proposed methods complied with Bournemouth University's academic regulations. Confirmation was given that all participants would be adults and would be asked to give consent once the research had been explained. Furthermore, it was confirmed that participants would not be remunerated, and it was clarified at the outset that participants could withdraw freely at any point.

In addition, a risk assessment was completed relating to potential health and safety risks associated with the data collection process. Letters were obtained from the research supervisor to facilitate the data collection process by obtaining permission from the following three authorities.

- Head of Department, Immigration Bangladesh Police, Dhaka, Bangladesh. (Appendix 2).
- Cox's Bazar Tourist Police, Cox's Bazar, Bangladesh. (Appendix 3).
- Cox's Bazar Municipality for Tourists, Businesses and Households. (Appendix 4).

The first phase of the planning process for data collection involved a comprehensive mapping of the targeted geographical research area. The researcher conducted research to identify the main areas of tourist activities within a five-kilometer radius of Cox's Bazar town centre. This area encompassed three main beach attractions in Cox's Bazar most frequented by tourists – Laboni Beach, Suganda Beach, and Kolatoli Beach. GIS mapping was employed in this process. Research was also conducted in order to identify key local government authorities who could provide necessary data to input into the research. These authorities included Cox's Bazar Beach Committee, Cox's

Bazar Traders' Association, and Cox's Bazar Hotel and Restaurant Association. In Bangladesh, governmental authorities use the following classifications to describe geographical areas for administrative purposes – upazillas; unions, villages, wards and mohallas and research was conducted relating to demographic and local government structures using this framework. This information enabled the selection of targeted geographical areas for convenience sampling techniques for administration of the questionnaires for households. Information was also requested relating to the number and size of businesses in the tourism value chain in Cox's Bazar. However, there was a limited amount of official data available in relation to actors in the local tourism value chain. Research was also conducted to identify the means of facilitating access to individuals, households, and businesses in order to conduct fieldwork research. This process involved identifying community leaders who could provide introductions to their communities and explain the aims and objectives of the research.

4.4.2 Questionnaires Design and Structured Interviews

Carvalho and White (1997) enumerate the relative strengths and weaknesses of participatory and survey-based approaches to data collection in relation to research into poverty alleviation. The strengths cited for the participatory approach are that it includes a more comprehensive definition of poverty, provides more insight into causal processes, and greater depth of qualitative information on certain questions. The weaknesses associated with the participatory approach are a lack of generalisability and challenges in assessing validity of the data. The strengths cited for the survey-based approach include the fact that it provides results which can be measured for reliability. This approach also makes aggregation possible. The weaknesses associated with

the survey-based approach are the possibility of sampling and non-sampling error, and the difficulty in capturing information which is not readily quantifiable.

The construction of a research instrument in quantitative research is critical because the data collected is entirely dependent on questions put to respondents (Kumar 2014). Two key factors which contribute to the design of a research questionnaire are the means by which the questionnaires are to be administered and the level of contact with respondents (Saunders 2012). Self-administered questionnaires are completed by respondents. However, due to the high levels of illiteracy in the population in Cox's Bazar, self-administered questionnaires were not a viable research instrument. The terms 'structured interviews' or 'interview schedules' relate to questionnaires where the researcher meets respondents and asks them a defined schedule of questions. The difference between structured interviews and semi-structured or unstructured interviews is that in structured interviews there should be no deviation from the defined list of questions (Saunders 2012). Kumar (2014) notes the advantages of interview schedules if respondents are illiterate. In this research it was decided to conduct structured interviews where questionnaires which would be administered verbally to the respondents. An advantage of the structured interview format is that provides comparable data (Kumar 2014).

Fourteen versions of questionnaires were developed for research purposes a household questionnaire, a tourist questionnaire, and a questionnaire specifically targeting the 12-tourism value chain business actors. Due to the fact that the vast majority of respondents were not literate in Bengali, it was decided to draft the questionnaires in English and the researcher would translate the questions verbally and record the replies. The tourist questionnaire was similar in terms of format and content for both domestic and international tourists. The

questionnaires included a range of question formats including requests for information, tick box items and close-ended questions.

4.4.3 Questionnaires for Tourists

The purpose of the questionnaires for tourists (Appendix 5) was to identify general characteristics about the tourists and specific details about their expenditure in Cox's Bazar. Paper-based questionnaires were selected as the most appropriate tool for this research due to the fact that they could be administered face-to-face and offered the option of reading the question to respondents, the majority of whom non-literate were. All questionnaire respondents in the tourist category were aged 18 years and older. The questionnaires were structured in three sections. The first four questions aimed to obtain basis demographic data from respondents – age, gender, level of educational attainment, and occupation. The focus of the second section of the questionnaire consisted of eight questions relating to the purpose of the visit to Cox's Bazar and details of holiday arrangements. The range of questions included duration of visit, size of party, type of accommodation, and booking arrangements for tour packages. The final section of the questionnaire asked for quantitative data relating to the respondents' expenditure on travel to destination, accommodation, food, souvenir shopping, local transport, excursions and total expenditure.

4.4.4 Questionnaires for Business Actors

The purpose of the questionnaires for actors in the tourism value chain (Appendices 6 to 17) was to elicit data relating to (i) level of revenue from tourists' expenditure, and (ii) expenditure by actors in the tourism supply chain

in Cox's Bazar. The selection of 12 actors was based on a mapping of the tourism value chain listed in table 4.3.

Table 4. 3: Selected 12 Business Actors Questionnaires

| |
|-----------------------------------|
| Name of the Business Actors |
| Accommodation Providers |
| Restaurants |
| Street Vendors |
| Handicrafts Vendors |
| Suppliers |
| Dried Fish Retailers |
| Tuk Tuk Drivers (Local Transport) |
| Rickshaw (Local Transport) |
| Local Shops |
| Beach Photographers |
| Beach Umbrella Rentals |
| Jeep Tour Providers |

Source: Author's Own Work 2017

The questionnaires for hotels and restaurants included options to identify any links as a number of restaurants operated within hotels. Interviewees were selected on a convenience sampling technique basis as they were located in proximity to beaches most frequented by tourists. The selected research instrument was a paper-based questionnaire as it facilitated structured interviews and aggregation of data. The introductory part of the questionnaire related to gender, place of residence, and details about the status of the business dependent on the nature of the goods or services provided. The second part focused on financial data (weekly, monthly, or yearly) related to revenue from a range of goods or services. The questionnaire also asked for information regarding cost structure of operations and specifically on the percentage of expenditure on goods and services (i) locally from Cox's Bazar, (ii) nationally from Bangladesh, or (iii) imported from abroad.

4.4.5 Questionnaires for Households

The purpose of this category of questionnaire (Appendix 18) was to gather data relating to income for local households and specifically to identify the proportion of households who were directly or indirectly in receipt of income from tourism-related activities. Once again, a paper-based research questionnaire was deemed the most appropriate because it facilitated a structured interview and aggregation of data. The first part of the questionnaire aimed to provide socio-demographic information including age and gender of head of household, household size and age composition, educational attainment and source of employment, residency status, and ethnic identity. It was clarified that all respondents must be aged 18 and above.

The second part of the questionnaire requested specific data relating to the sources of household income in order to identify the level of income from tourism-related activities and non-tourism-related activities. It also asked for household's estimation of the contribution to their employment patterns and incomes if there were no tourists in Cox's Bazar. The third section requested data relating to household expenditure on non-durable items broken down into 13 categories and five categories of durable items.

4.5 Sample Selection

The sample size depends on the total population of the target group in the study area. The sample sizes relating to tourists, business actors and households and the detailed primary data collection process are outlined in tables 4.4, 4.5 and 4.6. The data collected relates to arrivals and departures, international and domestic tourists, expenditure, and economic data at the local level from value chain major actors. Tourism Satellite Accounts (TSAs) are usually a valuable

source of data at the national level. However, as noted previously, the lack of availability of TSA data imposes limitations on research methodologies. In Bangladesh TSA accounts data are not publicly available. Consequently, TSAs were not included in the scope of the data collection process for this research. The sampling technique used to select research participants in the tourism value chain in Suganda, Kolatoli, and Laboni Beach was convenience sampling including *ad hoc* techniques. Jennings (2010) notes that the convenience sampling technique facilitates quick collection of data in a way that is inexpensive. A key reason for the use of convenience sampling in this research was the fact that there was no official list of individuals or employees engaged in the tourism value chain in Cox's Bazar. Due to the large populations within each category and the diverse range of business sizes (including informal and formal businesses) of value chain actors, *ad hoc* techniques were judged to be appropriate to meet research objectives. The lack of official data relating to details of residents engaged in income generating activities relating to tourism necessitated the use of convenience sampling. This technique was employed because it facilitates rapid data collection relatively inexpensively (Jennings 2010; Kumar 2015). However, a criticism of this method of sampling is its lack of clear purpose (Patton 2002).

The sample of tourists was selected based on convenience and *ad hoc* techniques due to the fact that this was the most efficient method of administering questionnaires because the vast majority of tourists are concentrated in proximity of three beaches (Amin 2017). A sample size of 80 was selected due to time constraints (four days), and it was not possible to access a higher percentage of the estimated 85,000 daily tourists and visitors

(The Independent Bangladesh 2019). Table 4.4 illustrates the total population and the total sample size of tourists.

Table 4. 4: Tourists Sample Selection

| Sample Category | Total Population (Daily basis) | Total Sample Size |
|-----------------------------|-----------------------------------|-------------------|
| Daily tourists and visitors | 85,000 | 80 |

Source: *The Independent* Bangladesh newspaper Online Desk (January 2019) and Field Work Data Collection, August 2017

The sample of business actors was selected based on convenience and *ad hoc* techniques because the majority of tourism related businesses are located in the proximity of three beaches. The sample included a range of types and sizes of businesses including formal and informal businesses and encompassed 12 categories which represented the accommodation, food, shopping, local transport, tours and beach activities and supplier components of the tourism value chain.

Table 4. 5: Business Actors Sample Selection

| Business Actors | Total Population | Sample Size |
|-------------------------|------------------|--|
| Accommodation | 220 | 20 |
| Restaurants | 154 | 22 |
| Retail Sales | 14,248 | 27 (Street Vendors) 25 (Handicrafts Retailers) 15 (Dried Fish Retailers) 5 (Local Beverage Shops) |
| Tuk Tuk Drivers | 2,700 | 20 |
| Rickshaw Pullers | 1,960 | 15 |
| Beach Photographers | 748 | 5 |
| *Beach Umbrella Rentals | 350 | 4 |
| Jeep Tours | 54 | 4 |
| Wholesalers | 2,263 | 27 |
| Total Sample Size | | 189 |

Sources: BBS 2011; 2013; Mamun et al. 2013; The Financial Express 2018 and Field Work Data Collection, August 2017)

*No data was available regarding the total population of beach umbrella rentals.

A total of 10 days was spent, and the time constraint was a key factor in the selection of the size of the sample, particularly as the questionnaires required detailed financial information which was time consuming for respondents to complete.

Table 4. 6: Household Sample Selection

| Cox's Bazar Sadar Upazila | Total Households | Sample Size |
|--------------------------------|------------------|-------------|
| Ward No-01 (Total 4 Villages) | 4532 | 25 |
| Padnad Del | 1393 | 19 |
| Somiti Para | 1131 | 6 |
| Ward No-06 (Total 15 Villages) | 3080 | 22 |
| Islamabad | 118 | 11 |
| Natun Para | 119 | 11 |
| Ward No-08 (Total 8 Villages) | 2454 | 19 |
| Guldigir Para | 232 | 5 |
| Gitipoli | 215 | 14 |
| Ward No-10 (Total 8 Villages) | 1609 | 31 |
| TNT Colony | 117 | 20 |
| Bagan Para | 135 | 6 |
| Bonorupa Para | 115 | 5 |
| Ward No-12 (Total 9 Villages) | 2752 | 30 |
| Adarsha Gram | 133 | 8 |
| Link Road | 576 | 9 |
| Char Para | 246 | 13 |
| Total Sample Size | | 127 |

Source: Bangladesh Bureau of Statistics (BBS) Statistics and Informatics Division (SID) Ministry of Planning Government of Bangladesh, District Statistics 2011 Cox's Bazar District, p.31 and Field Work Data Collection, August 2017

In relation to the sample of households the sample of 127 households was selected on a convenience technique because the majority of owners and employees of tourism-related businesses are resident in a cluster of 12 villages located within five kilometres of the three tourist beaches. Time constraints (six days) contributed to the size of the sample and the administration of the questionnaires required detailed information from households. The sample of 127 households included households of varying sizes, incomes, levels of expenditure and ethnic backgrounds and occupations related to tourism and non-tourism employment.

4.5.1 Sample Size Collection Timeframe

The timeframe for the data collection process was from 10 August to 30 August 2017.

Table 4. 7: A Detailed Breakdown of Primary Data Collection Timeframe
Data Collection Timeframe (10 August to 30 August 2017)

| Tourists, Business Actors, and Households | | | | |
|---|-------------------------|---|-------------|-----------------------|
| Date | Time of Collection Data | Total Hours Spend | Sample Size | Actors |
| 11th August | 0900 to 1700 | 6 hours each questionnaire spent approximately 30 minutes | 20 | Accommodation |
| 12th August | 0900 to 1800 | 7 hours each questionnaire spent approximately 30 minutes | 22 | Restaurants |
| 13-16th August | 0900 to 1700 | Total 4 days spent, each day approximately 6 hours and 30 minutes spent | 80 | Tourists |
| 17th August | 0900 to 1800 | 8 hours each questionnaire spent approximately 30 minutes | 25 | Handicrafts Retailers |
| 18th August | 0900 to 1800 | 8 hours each questionnaire spent approximately 30 minutes | 27 | Suppliers |
| 19th August | 0900 to 1800 | 8 hours each questionnaire spent approximately 30 minutes | 27 | Street Vendors |
| 20th August | 0900 to 1700 | 6 hours each questionnaire spent approximately 30 minutes | 20 | Tuk Tuk Drivers |

| | | | | |
|----------------|--------------|--|-----|---|
| 21st August | 0900 to 1700 | 6 hours each questionnaire spent approximately 30 minutes | 15 | Rickshaw Drivers |
| 22nd August | 0900 to 1700 | 6 hours each questionnaire spent approximately 30 minutes | 15 | Dried Fish Retailers |
| 23rd August | 0900 to 1700 | 6 hours each questionnaire spent approximately 30 minutes | 18 | Local Shops, Beach Umbrellas, Jeep Tours, and Beach Photographers |
| 24-29th August | 0900 to 1800 | Total 6 days spent, each day approximately 7 hours and 30 minutes spent. | 127 | Households |
| Total | | | 396 | |

Source: Fieldwork, August 2017

A detailed breakdown of the data collection schedule with relevant dates is presented in table 4.7 above. A total of 20 days was spent gathering data. The reasons for the selection of this timeframe were partly due to the researcher's work commitments. This timeframe is within the off-peak tourism season in Cox's Bazar, which runs from May to August. It was decided that it was not a disadvantage to conduct data collection during the off-peak season as the research did not take seasonality into account. In addition, there were advantages in conducting research in the off-peak season. Firstly, a lower volume of tourists meant that respondents in the business actor category could devote more time to answering the detailed questionnaires.

In addition, during the peak season, the three beaches which comprise the research setting are highly overcrowded. Consequently, it was more convenient to conduct face-to-face research during the less crowded off-peak season.

4.5.2 Sample Size Response Rate

The initial total sample size numbered 425, and the number of respondents (individuals and households) was 127 which constitutes an overall 93 per cent response rate. Households had the highest level of response at 98 per cent

and the proportion of tourists who responded to the questionnaire was 94 per cent. The lowest response rate related to business actors in the tourism value and the rate of response was 90 per cent.

Table 4. 8: Response Rate of Research Participants

| Actors | Total number in sample | Total number of responses | Response rate % |
|----------------------------|------------------------|---------------------------|-----------------|
| 1. Households | 130 | 127 | 98 |
| 2. Tourists | 85 | 80 | 94 |
| 3. Suppliers | 29 | 27 | 93 |
| 4. Restaurants | 25 | 22 | 88 |
| 5. Hotels | 25 | 20 | 88 |
| 6. Street Vendors | 28 | 27 | 96 |
| 7. Handicraft Retailers | 28 | 25 | 89 |
| 8. Dried Fish Retailers | 16 | 15 | 94 |
| 9. Tuk tuk Drivers | 22 | 20 | 91 |
| 10. Rickshaw Drivers | 16 | 15 | 94 |
| 11. Local Beverage Shops | 6 | 5 | 83 |
| 12. Photographers | 5 | 5 | 100 |
| 13. Jeep Tour Providers | 5 | 4 | 80 |
| 14. Beach Umbrella Rentals | 5 | 4 | 80 |
| Total | 425 | 396 | 93.17% |

Source: Fieldwork, August 2017

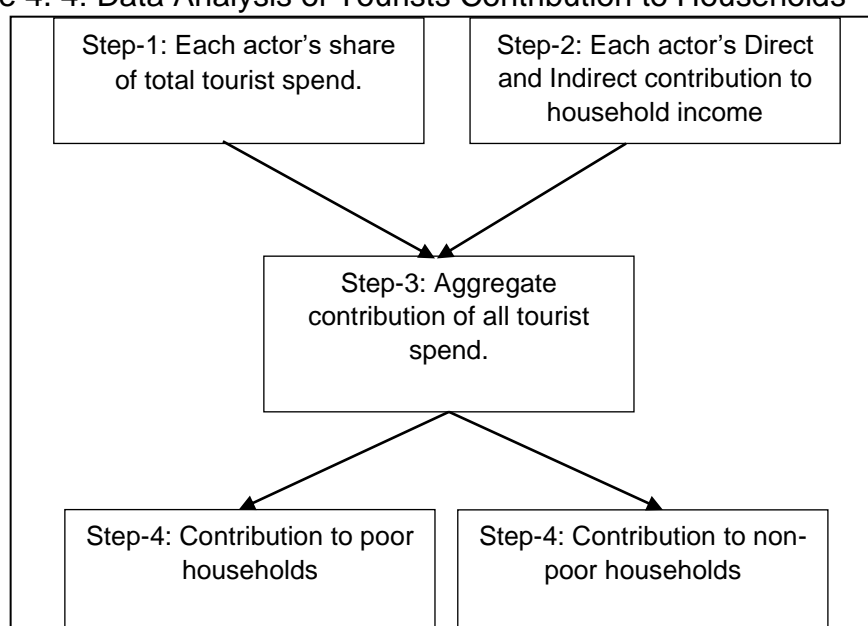
4.6 Data Analysis

This research involved extensive collection of data. Results of quantitative data were recorded on excel spreadsheets. Analysis of the data was carried out using an advanced excel sheet. The next stage was to edit or clean the raw data. This was conducted in order to minimise errors and incomplete data. Once the data was cleaned, the next step was to code it so the information could be more easily analysed. The cleaned data was then subject to a process of analysis which comprised four main steps. Firstly, calculations were conducted to identify the share of total tourist expenditure allocated to each actor. The next step involved analysing fieldwork research data to assess each actor's direct and indirect contribution to household income. This was followed by a calculation of the aggregate contribution of all tourist expenditure. Finally,

data analysis was conducted to calculate the proportion of this contribution which reaches poor households and non-poor households.

In order to measure the contribution of tourist spending to households' incomes it was necessary to analyse the responses to questionnaires in order to calculate each business actor's share of tourists' total expenditure. All 12 business actors in the research sample were categorised into five cohorts. In some categories which are closely linked, questionnaires were consolidated as one cohort. The first cohort is accommodation providers. The food cohort comprises responses from restaurants, food vendors, and beverage vendors. Dried fish retailers and handicrafts retailers are combined in the shopping cohort. The local transportation cohort incorporates tuk tuk drivers and rickshaw pullers. Similarly, the tours and beach activities category combine responses to questionnaires from photographers, jeep tours, and beach umbrella rentals. The tourists' expenditure on travelling to Cox's Bazar has been ignored although the data was collected. The reason is that this expenditure type has no contribution to local household income.

Figure 4. 4: Data Analysis of Tourists Contribution to Households



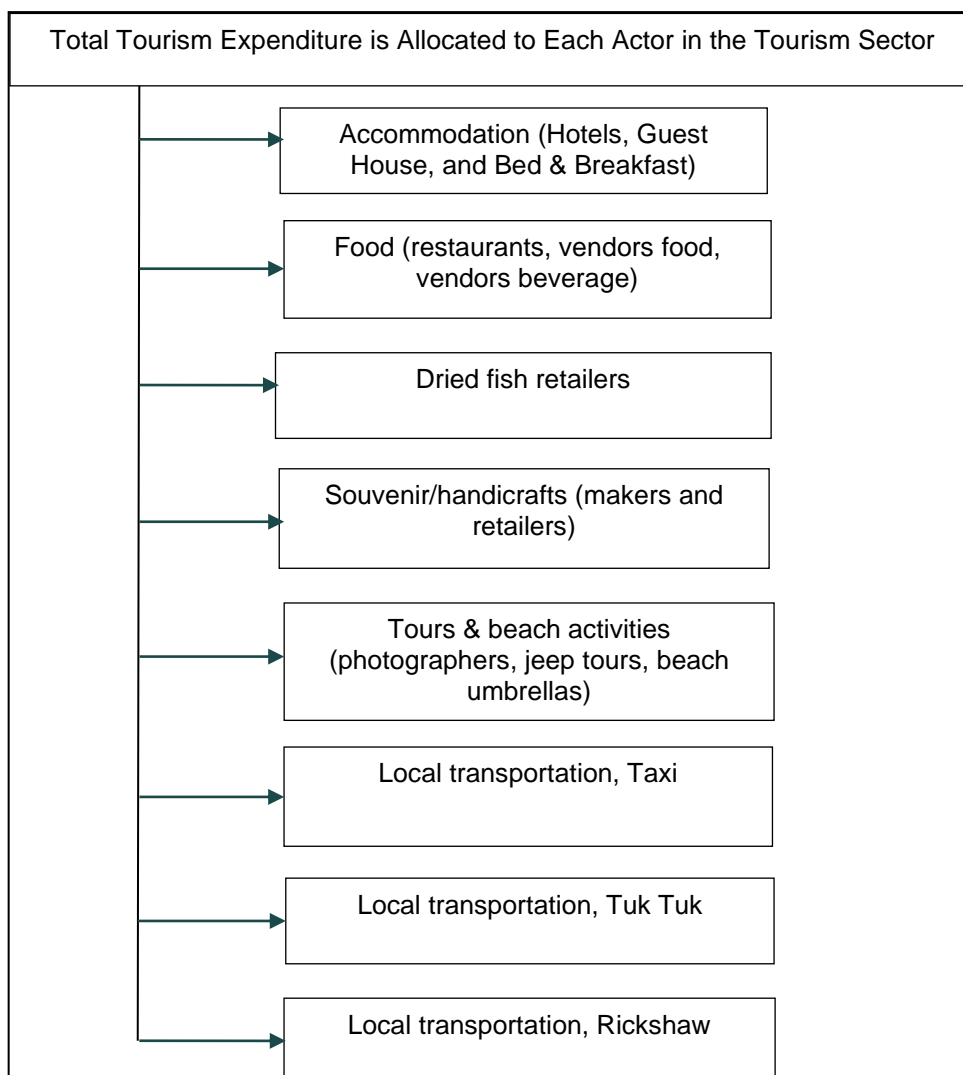
Source: Author's Own Work 2019

4.6.1 Calculation of Contribution to Household Incomes

In order to calculate the percentage of the tourism expenditure on a specific actor which contributes to household income, the first stage is to divide the actors' revenue into a number of categories, as shown in figure 4.5. The analysis was conducted based on the following criteria.

- **Direct Contribution:** Only staff costs and profits are considered to have a direct contribution to household incomes.
- **Indirect Contribution:** Cost of sales and operational expenses are considered to have an indirect contribution to household incomes. An example is the cost of sales which are typically incurred with suppliers who may employ local staff.
- **No Contribution:** VAT, and corporation and income taxes are assumed to have no contribution to local household incomes.

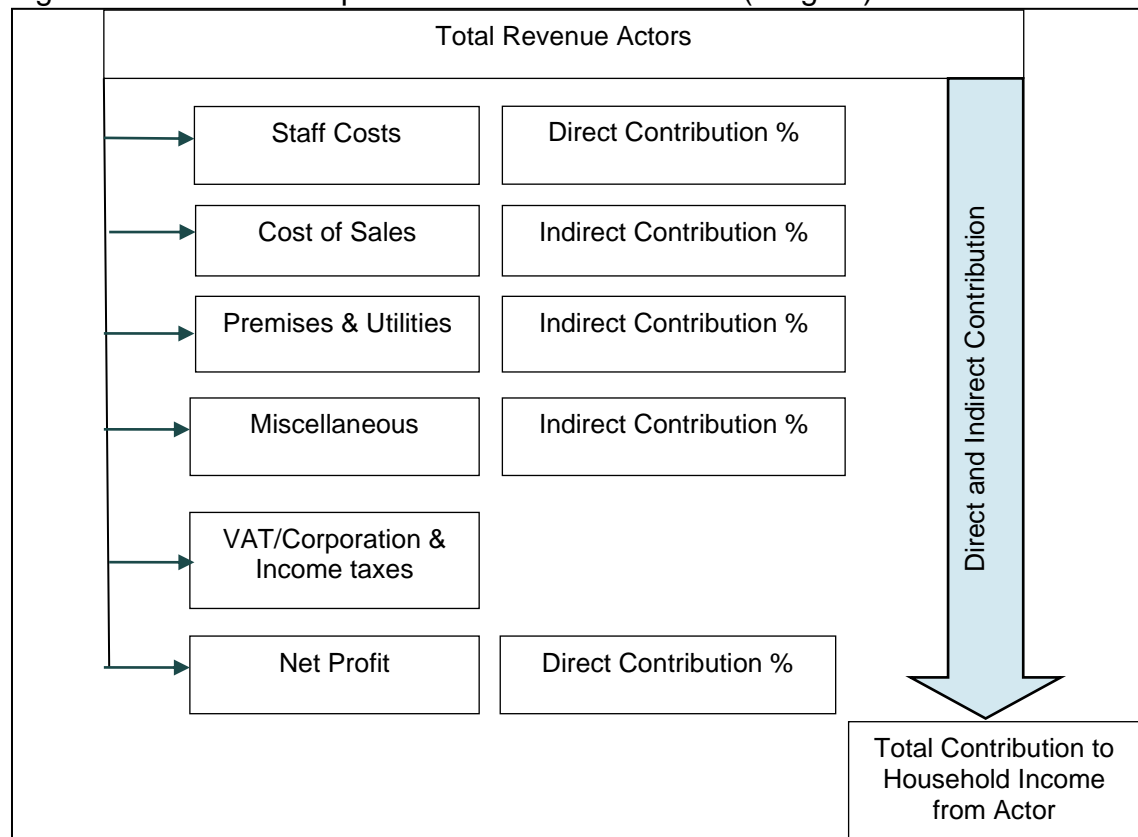
Figure 4. 5: Direct and Indirect Contribution to Households (Stage 1)



Source: Authors' Own Work 2017

The total contribution is the sum of the direct and indirect contribution and is expressed as a proportion of revenue. If the total contribution is 20 per cent of revenue, it follows that 20 per cent of the revenue constitutes a direct or indirect contribution to local households' incomes. The second stage of the analysis is illustrated with an example in figure 4.6.

Figure 4. 6: Tourism Expenditure to Business Actor (Stage 2)

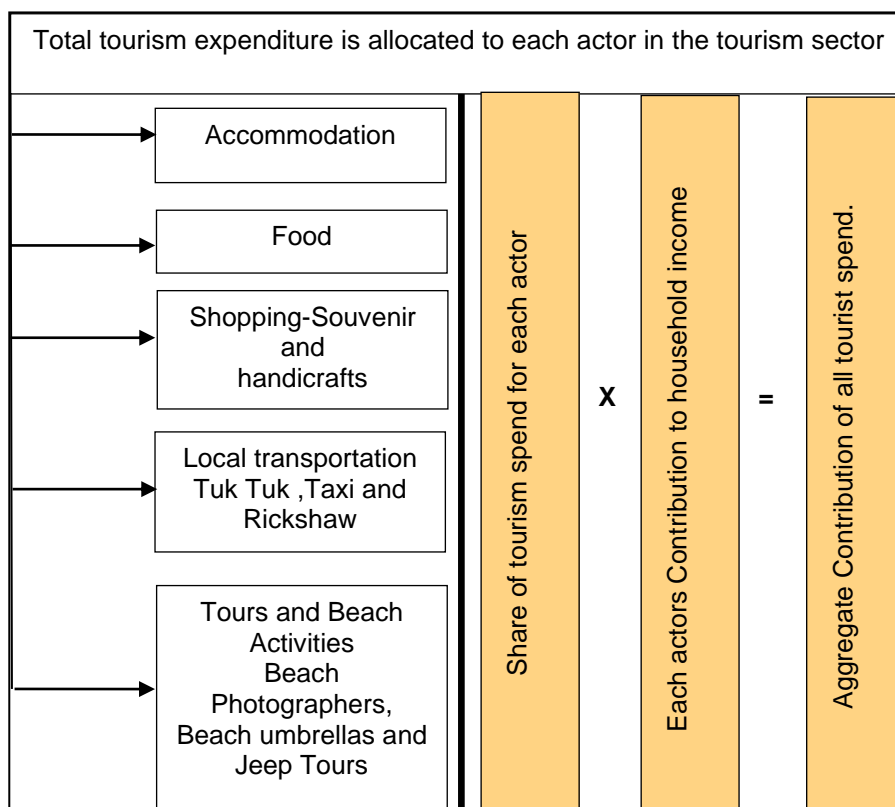


Source: Author's Own Work 2019

4.6.2 Tourist Total Contribution to Local Household Incomes

Having determined the contribution of tourist spending on household incomes in Cox's Bazar, the next step is to calculate which proportion of this contribution reaches poor households. The first step in this process is to calculate the poverty headcount ratio which provides information on the level of poverty for each of the occupations identified amongst the 127 household questionnaires, based on the World Bank's PPP definition of poverty.

Figure 4. 7: Calculate Tourists' Total Contribution to Households

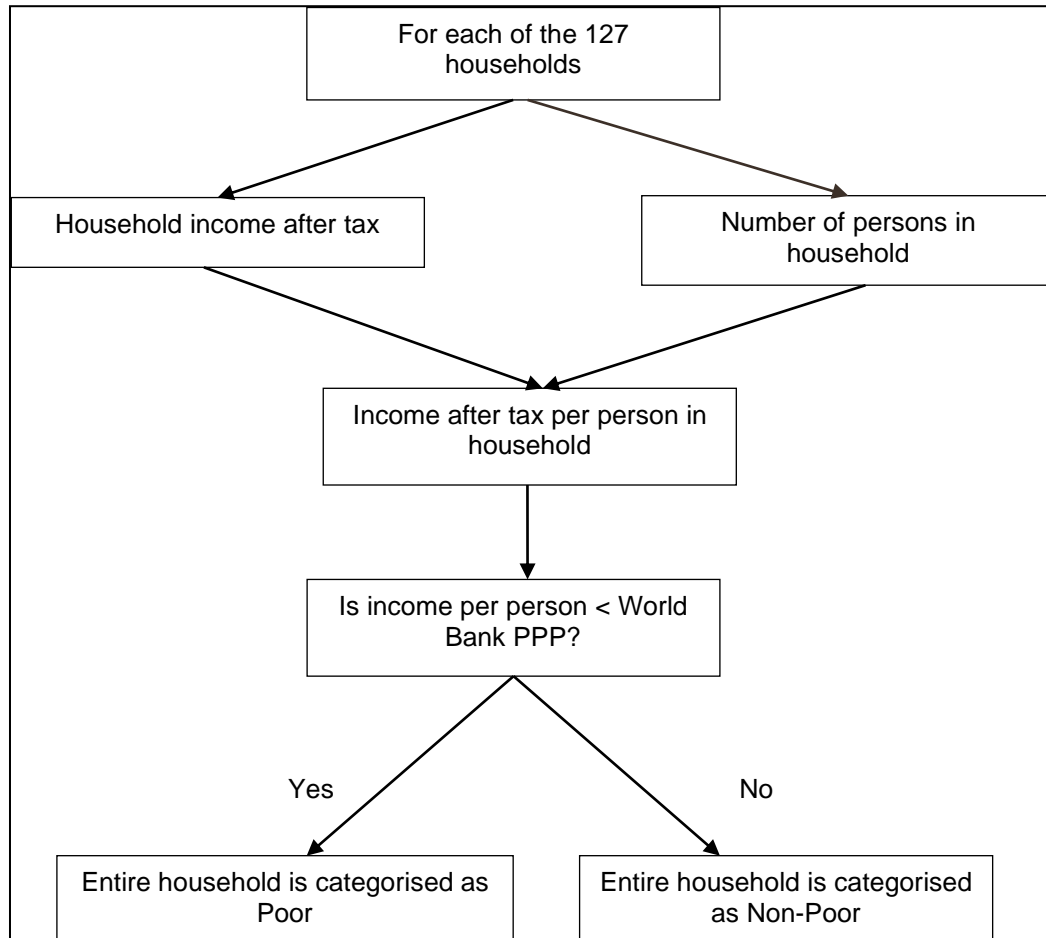


Source: Author's Own Work 2019

4.6.3 Calculation of Poverty Head Count Ratio

Calculation of Poverty Head Count Ratio is a two-stage process. First, the after-tax income of each household is determined and given the number of persons in the household, the income per person is calculated. Secondly, if the income per person is below the World Bank PPP threshold, the entire household is considered poor. Figure 4.8 sets out this process in more detail.

Figure 4. 8: Calculation of Poverty Head Count Ratio



Source: Author's Own Work 2019

4.6.4 Poverty Headcount Ratio for Each Occupation

Twenty-eight occupations were identified from the 127 household questionnaires. The 127 households comprise a total of 657 individuals. Each of the 127 households is assigned an occupation based on the occupation of the primary earner and each household is categorised as poor or non-poor, as per above. For each of the 28 occupations, the poverty headcount ratio is calculated as follows.

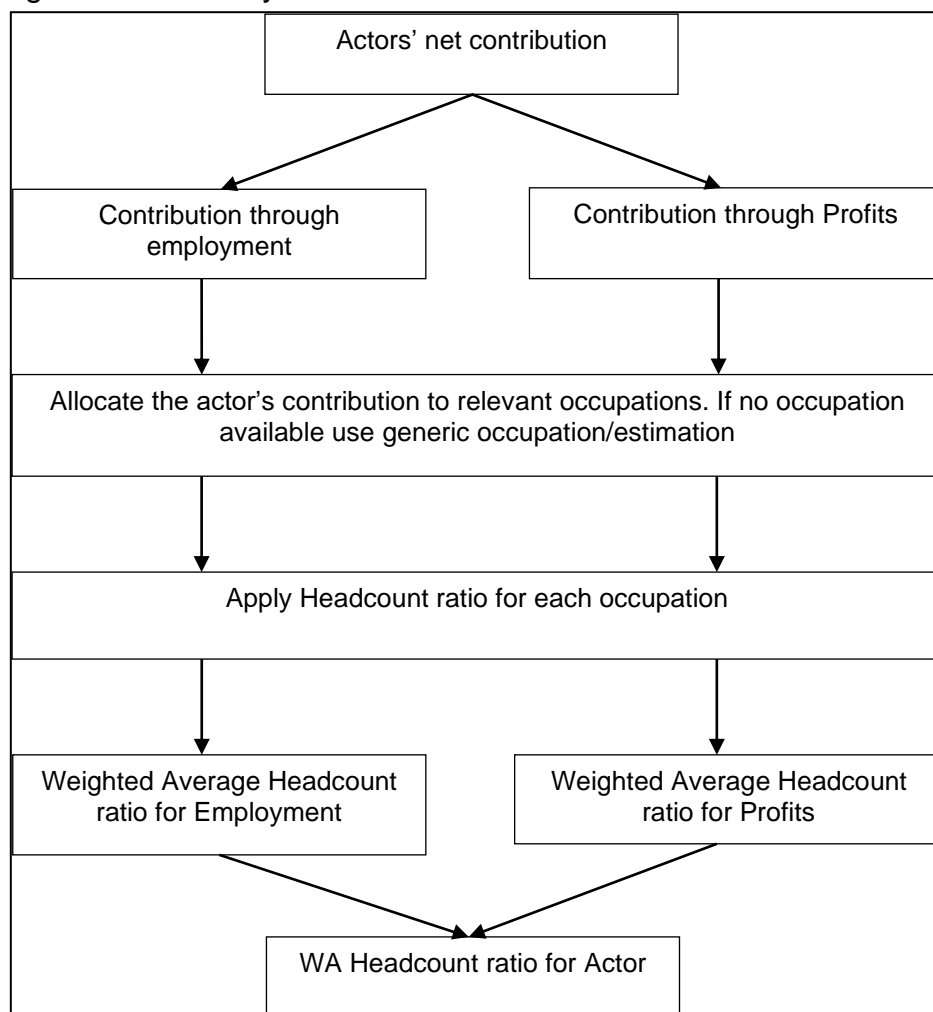
Poverty headcount ratio for Occupation X

$$= \frac{\text{Count of poor persons for Occupation X}}{\text{Count of all persons for Occupation X}}$$

4.6.5 Tourism's Contribution to Poor Households' Incomes

The purpose of this analysis is to determine the proportion of tourist spending that contributes to poor households' incomes. An actor may account for a large proportion of tourist spending and may also have a material contribution to household incomes, but poor households may still benefit little from that actor. It may be impossible to link a relevant occupation to an actor's contribution through profits. For instance, profits from hotels have been deemed to have a positive contribution to local households but 'hotel owner' is not one of the 28 occupations specified. This is partly due to the interview process being conducted in poorer areas and also due to there not being many hotel owners in the general area of Cox's Bazar. It is reasonable to assume that the household of a hotel owner would not be below the World Bank PPP threshold and therefore a poverty headcount ratio of zero is assumed for this and certain other occupations. Where more than one occupation can be allocated to an actor's contribution the share of the contribution is split equally amongst the relevant occupations.

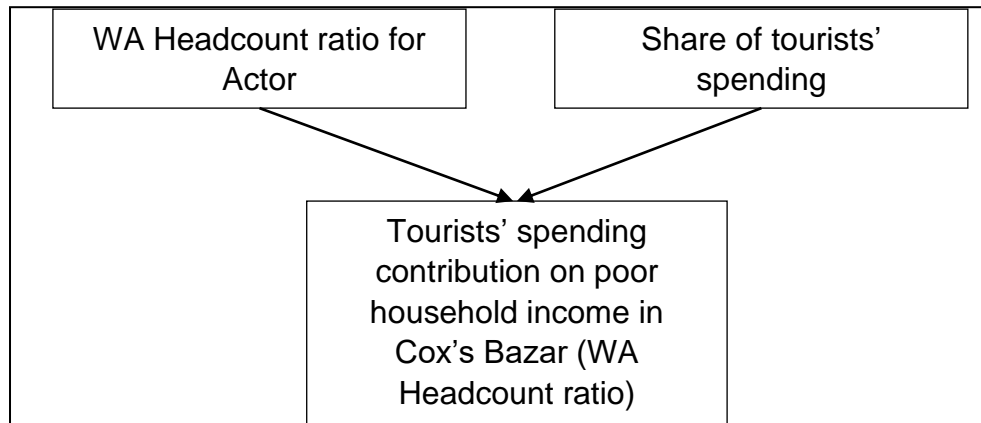
Figure 4. 9: Poverty Headcount Ratio for Each Actor



Source: Author's Own Work 2019

Having determined the headcount ratio for each actor, the weighted average headcount for all actors can be calculated. Each actor's headcount ratio is weighted by its proportion of total tourist expenditure. The result determines the percentage of all tourists' spending that reaches poor households. This process is outlined in figure 4.10.

Figure 4. 10: Tourists Contribution to Poor Households' Income



Source: Author's Own Work 2019

4.7 Limitations and Challenges

As discussed in chapter 2, the definition of poverty and means of poverty measurement are complex issues incorporating social, as well as economic criteria. The relationship between tourism and poverty alleviation is highly complex. There is generally a low level of awareness of the concept of pro-poor tourism in Bangladesh and consequently it was difficult to access much secondary academic research about this topic specifically relating to Cox's Bazar. Moreover, as has been mentioned previously, there is generally a lack of availability of data for researchers related to tourism and poverty in Cox's Bazar (Centre for Policy Dialogue 2015; Amin 2016). Time constraints also imposed limitations on the research. The fieldwork aspect of the research was conducted over a period of 20 days in August 2017. Poor infrastructure made travel in the area difficult and restricted access to a wider number of respondents. Time and budget constraints acted as limitation to the geographical reach of the research. Research was conducted in the low season in Cox's Bazar. The low season was selected based on the researcher's work commitments and availability to travel to Bangladesh to conduct field research. However, this paper does not consider seasonality or non-seasonality.

The geographic locations selected for data collection were limited to Kolatoli, Suganda, and Laboni Beach districts. The specific locations within these districts in which research was undertaken in these areas were Thana Road, Laldigir Par, Bazar Ghat, Najirar Tek, as these are the locations with the highest concentrations of tourism accommodation and services. In addition, Nazirar Tek was selected for data collection because it is the centre of dried fish wholesalers' trade, where fishermen sell their catch to the Nazirar Tek wholesalers. The scope of the value chain in terms of transport was limited to transport services within Cox's Bazar or excursions based on the resort. Transportation costs to Cox Bazar from other parts of Bangladesh or abroad were not included in the research.

4.7.1 Challenges in Fieldwork Data Collection Process

Fieldwork is an important aspect of academic research, and the conduct of fieldwork research in tourism can be a complex and challenging experience (Hall 2011). The challenges presented by the data collection process with households, tourists and business actors in Cox's Bazar are outlined together with steps taken to overcome these barriers.

4.7.2 Challenges of Data Collection from Tourists and Businesses

Four days were spent on field research with tourists on the Laboni, Suganda, and Kolatoli beaches. The first step in the process was an attempt to establish data on the numbers of arrivals and departures from the Cox's Bazar

City Corporation and Tourist Police Department. However, this data was not available. Consequently, tourists were approached in the three beach areas to administer the research questionnaires. This was done over a period of four days. The first challenge faced was opposition from the beach committee who objected to tourists answering questions about expenditure with different actors. This slowed down data collection and consequently, it was only possible to collect data from 80 tourists. While a larger sample could have reduced sampling bias, the size here is sufficient for analysis and inference on the data collected.

The second challenge faced was from businesses which were unable or not willing to share confidential information about their revenue and employees. Given the nature of the service providers, the sample range was highly diverse and included actors in the formal and informal economies. Given the high level of participation in the informal labour market in Bangladesh it is important to include businesses from this sector in the sample. This however, introduced more challenges in the data collection exercise.

Businesses which were operating informally were not willing to share information on revenue or employment on the basis that they had limited records of income and expenditure. Furthermore, a number of business owners and operators are illiterate and only have very limited written record of transactions. The researcher assisted the businesses to fill in the form and, in such cases, extra time was allocated to provide additional information on the nature of the data that was being collected. Other businesses, especially the hotel and restaurant owners stated that such information is confidential for commercial reasons and were reluctant in providing the relevant information. For these reasons, the convenience sample technique is used here.

Furthermore, 12 different occupational areas are considered in this study. There are additional providers which could have been included however, only the most prominent types of businesses used by the tourists are considered here, as it was not realistic or feasible to include all. Questionnaires designed for the businesses were adjusted for each type of business. This reduced inaccuracy in data collection and ensured that relevant data was collected. The sample of business actors is wide in terms of occupational areas; however, the sizes of the samples of some of the occupational areas were small. Furthermore, given the timescale and scope of the study, data were collected at a particular point in time. In order to increase the scope of the study, data can be collected in different seasons during the year. This will show the distinction between peak and off-peak and the findings can be more accurately generalized.

Saunders et al (2009) note that an advantage of a relatively small sample size is that it facilitates the design of research tools and the gathering of more detailed data. In the case of tourists, the sample included data from three types of tourist (domestic, foreign and diaspora), further divided into six categories (holiday, conference, NGO, business, visiting friends and family and day visits) their sociodemographic profile and a comparative analysis of their expenditure patterns. The business actors sample incorporated 10 per cent of hotels and restaurants in Cox's Bazar and detailed data was collected relating to revenue and costs. In the case of the additional 10 business actors, the relatively small sample size facilitated the production of specific questionnaires relevant to each business actor.

4.7.3 Challenges Related to Households' Data Collection

In research relating to poverty analysis, it is common to focus on households rather than individuals. However, as Appleton and Booth (2001) note, there are

limitations associated with household surveys. Income may not be shared equally between all household members. Also, some household members may not be able to provide accurate data relating to income or expenditure. The latter limitation applies in patriarchal societies such as Bangladesh where the male heads of households may not provide details of their income and expenditure to the female household members. Research was conducted with 127 households comprising 657 members in 12 villages. There were a number of challenges particularly in regard to accessing data in order to plan fieldwork research. No data was publicly available on household composition, so I was obliged to travel directly to villages within a five kilometre radius of Cox's Bazar and conduct door to door research without prior appointment.

The 12 villages were selected out of 44 in the *upazilla* based on intelligence from street vendors and tuk tuk and rickshaw drivers and other actors who identified villages with a high proportion of residents engaged directly or indirectly in the tourism sector. Another challenge was an initial lack of trust among householders which prevented them from participating in the research. In order to overcome this challenge, the help of heads of village committees was sought. They offered assistance in communicating the aims and process of the research to the villagers and encouraging them to participate.

4.7.4 Ethical Compliance in Fieldwork Research

Throughout the fieldwork research, full compliance with Bournemouth University's Research Ethics Code of Practice was maintained. All research was conducted with respondents' informed consent. Respondents were all over the age of 18 and no remuneration was paid for participation. All fieldwork research activities were conducted in a manner which safeguarded the health

and safety of respondents. Data collected has been anonymized and is kept safely.

4.8 Chapter Summary

This chapter has explored the philosophical dimensions and methods underpinning this research and an overview of the positivist approach adopted in this study (Denzil and Lincoln 1994). The rationale for the use of a quantitative methodological approach was presented and reasons for the unsuitability of the multiplier, CGE, SAM and input-output methods were specified (Briassoulis 1991; Dwyer et al. 2004) including challenges in terms of accessing data and unavailability of TSAs. This chapter aimed to justify the selection of the value chain analysis approach as the most appropriate diagnostic tool for identifying linkages and leakages in the tourism value chain (Mitchell et al. 2009). The data collection process outlined in this chapter is based on a three-stage value chain diagnosis (ODI 2009). The formulation of fourteen versions of research questionnaires and the process of administration of the questionnaires were described. The selection of convenience and *ad hoc* sampling techniques was explained, and sample size and response rate specified. The calculations for the data analysis process were described in detail in five stages incorporating poverty head count ratios in order to measure the contribution of tourists' spending to poor households. Finally, limitations relating to primary data collection were outlined.

CHAPTER 5: MAPPING THE TOURISM VALUE CHAIN IN COX'S BAZAR

5.1 Introduction

This research uses a tourism value framework to gain an understanding of the impact of tourism expenditure on the local economy in terms of linkages and leakages and the direct and indirect contribution to the incomes of poor households. An initial step in this process is the construction of value chain maps for each actor based on analysis of the quantitative research data collected during the field work research. Value chain mapping facilitates the measurement of the share of tourism spending in different segments of the value chain and analysis of the extent of any links with the local economy and ultimately the share of benefits which form a contribution to poor households (Mitchell and Faal 2008).

This chapter begins with a delineation of different types of tourists in Cox's Bazar and an analysis is conducted relating to the share of tourists' spending which is allocated to different actors in the local economy. Mapping the tourism value chain framework begins with suppliers in Cox's Bazar and there is an explanation of the role of intermediaries in this chain. This is followed by a mapping of 12 business actors in the tourism value chain. The scope of this mapping process involves an analysis of business characteristics, monthly income statements, direct and indirect contributions to local households and measurement of linkages and leakages. The chapter concludes with a two-stage mapping framework of the tourism value chain in Cox's Bazar based on an analysis of the quantitative research conducted for this thesis. The first stage maps all actors in the value chain and illustrates overall linkages and leakages and total contribution to household's income. The second stage comprises related analysis of the net contribution of all actors to poor households' incomes

from tourists 'expenditure. Detailed examination of this data in the context of the relationship between tourism and poverty headcount ratios in Cox's Bazar is conducted in chapter 6.

5.2 Tourists' Profile

A total of 80 tourists responded to a questionnaire for this research and the results are illustrated in table 5.1.

Table 5. 1: Tourists' Characteristics

| Characteristic | Number | Number % |
|---------------------------------------|--------|----------|
| Tourist-Male | 76 | 95.0 |
| Tourist-Female | 4 | 5.0 |
| Total | 80 | 100.0 |
| Age Range (Average) | | |
| 18-25 | 20 | 25.0 |
| 26-35 | 25 | 31.3 |
| 36-45 | 22 | 27.5 |
| 46-55 | 10 | 12.5 |
| 56+ | 3 | 3.8 |
| Education Level | | |
| No Formal Education | 5 | 6.3 |
| Primary Education | 12 | 15.0 |
| Secondary Education | 21 | 26.3 |
| Higher Education (College/University) | 42 | 52.5 |
| Occupation | | |
| Own Business | 15 | 18.8 |
| Full-Time Employment | 45 | 56.3 |
| Part-Time Employment | 2 | 2.5 |
| Self-Employed | 2 | 2.5 |
| Students | 14 | 17.5 |
| Unemployed | 1 | 1.3 |
| Other (Retired) | 1 | 1.3 |

Source: Fieldwork, August 2017

The results in table 5.1 demonstrate that 95 per cent of respondents are male. This gender imbalance reflects literature (Amin 2017) which notes the patriarchal nature of Bangladeshi society and the prevalence of large groups of male tourists on the beaches. The second section of the results relates to the age profile of the respondents and shows that the highest number of tourists were in the 26 to 35 age group followed by the 36 to 45 age group. The results indicate a high number of students (17.5 per cent) visit the resort in groups. In

terms of educational attainment, the results indicate that 52.5 per cent of respondents had completed higher education. The majority of tourists are within the middle-income group, 56.3 per cent of respondents were in full-time employment and 18.8 per cent owned their own business.

An analysis of 80 tourists' questionnaires (table 5.2) shows that only three types of tourists' residence status are identified. The three categories of tourists based on residency are Bangladeshi (domestic tourists) for which the sample size was 71, Bangladeshi people living abroad (diaspora tourists) for which the sample size was 5 and foreign tourists for which the sample size was 4. *The Economist* (June 2019) reported that domestic tourism in Bangladesh is expanding at a rapid rate. Media reports (The Independent in Bangladesh 2018) note the significant increase in the domestic tourism segment with visitor numbers exceeding approximately 700,0000 tourists, which has risen sharply since 2000 when the figure was only 500,000 tourists. The majority of domestic tourists are in the younger age range and they travel to the resort to enjoy the natural environment and the local atmosphere.

Table 5. 2: Tourists' Residency Status

| Residence | Number | Number % |
|--------------------------------------|--------|----------|
| Bangladesh (Domestic) | 71 | 88.8 |
| Bangladeshi living abroad (Diaspora) | 5 | 6.3 |
| Foreign | 4 | 5.0 |
| Total | 80 | 100.0 |

Source: Fieldwork, August 2017

5.2.1 Tourist Types and Purpose of Visit

The data in table 5.3 relates to the primary purpose of a visit to Cox's Bazar. A total of 80 tourists responded to questionnaires to identify the tourists' primary purpose of the visit. The results analyse the different market segments of tourism included in the sample. A majority of the tourists confirmed their main

purpose of the visit was a holiday with family and friends. The second largest cohort of tourists visiting Cox's Bazar is in the business category. There are many restaurants and hotels in Cox's Bazar, and many have local and national suppliers directly indirectly involved in business in Cox's Bazar. The businesses include handicrafts, dried fish, vegetables, food suppliers, water suppliers, hotel toiletries and linen suppliers.

Table 5. 3: Types of Tourists and Purpose of Visit

| Purpose | Number | Share % |
|---------------------------|--------|---------|
| Holiday | 52 | 65.0 |
| Business | 10 | 12.5 |
| Conference | 8 | 10.0 |
| NGO | 5 | 6.3 |
| Day Visit | 4 | 5.0 |
| Visiting Friends & Family | 1 | 1.3 |
| Total/Avg. | 80 | 100 |

Source: Fieldwork, August 2017

Significantly, the results indicate that the tourists in the Conference and Seminar category comprise 8 per cent of the total. It was acknowledged that few private companies were organising conferences in Cox's Bazar during the time of the fieldwork data collection in August 2017. The two types of tourist categories with the lowest numbers are day visit tourists and visiting friends and family tourists.

5.2.2 Types of Tourist Expenditure Patterns

Table 5.4 shows the results from questionnaires relating to the major areas of tourists' expenditure categorised into total spending, the average duration of stay, and the spending per day per person. The total expenditure of the holiday tourists' segment was BD Tk. 635,635 during their stay in Cox's Bazar. The average duration of stay was 3.2 days and expenditure per person was BD Tk. 12,224. The category of tourists with the highest level of expenditure was NGO

tourists which was BD Tk. 7,109 per person per day, however the average duration of stay was relatively short at 2.8 days. Only five NGO officials responded to the questionnaires, and the total expenditure was relatively high at BD Tk. 99,520. The majority of the NGO officials are foreign, and this category of tourists tends to spend money on 4- to 5-star hotels. The second highest level of tourists' expenditure is from conference tourists and the results indicate that total spending for this group was total BD Tk. 126, 290. The average duration of stay was 2.3 days and the spending per day per person was BD Tk. 7,016. This information highlights this category of tourists' expenditure on 4-to-5-star hotels, and 3-to-5-star restaurants. In most cases companies pay the total expenditure. Business tourists spend BD Tk. 2,448 per day per person, which is relatively low, and the average duration of stay is 2.4 days.

The two types of tourists with the lowest levels of expenditures are day visit tourist and tourists visiting friends and family.

Table 5. 4: Tourists' Purpose of Visit and Major Expenditure

| Purpose | Number of Tourists | Tourists (%) | Total Spending (BD Tk.) | Spending Per person (BD Tk.) | Average Duration of Stay (Days) | Spending Per Day Per Person (BD Tk.) |
|--------------|--------------------|--------------|-------------------------|------------------------------|---------------------------------|--------------------------------------|
| Holiday | 52 | 65.0 | 635,635 | 12,224 | 3.2 | 3,829 |
| Business | 10 | 12.5 | 58,740 | 5,874 | 2.4 | 2,448 |
| Conference | 8 | 10.0 | 126,290 | 15,786 | 2.3 | 7,016 |
| NGO | 5 | 6.3 | 99,520 | 19,904 | 2.8 | 7,109 |
| Day Visit | 4 | 5.0 | 1,620 | 405 | 0 | 0 |
| Visiting F&F | 1 | 1.3 | 23,899 | 23,899 | 270.0 | 89 |
| Total/Avg. | 80 | 100.0 | 945,704 | 11,821 | 6.2 | 1,922 |

Source: Fieldwork, August 2017

5.2.3 Tourist Expenditure by Sector

Table 5.5 illustrates total tourism expenditure in the context of five cohorts of business actors in the tourism value chain in Cox's Bazar. Analysis of the data highlights that the majority of tourist expenditure is on the accommodation

sector (54.7 per cent). The accommodation classification incorporates hotels, motels, guesthouse, and rented apartments. The second largest area of tourists' expenditure relates to food. The results show that tourists' spending on restaurants outside their hotel equated to 28.2 per cent out of the total expenditure in the food sector. The second largest area of expenditure is related to souvenir and handicrafts items. The tourist expenditure in this category is 6.2 per cent and most of this figure (3.2 per cent) relates to dried fish. Dried fish is a delicacy associated with Cox's Bazar and tourists buy dried fish as a souvenir. The local transportation sector includes taxis, tuk tuks and rickshaws and the expenditure by tourists on local transportation is 2.6 per cent. The final category of tourist expenditure is the tours and beach activities category which incorporates jeep tours, umbrellas rentals and purchases of beach photographs. Tourists' total expenditure is 1.9 per cent in this category. This category has a strong linkage and a relatively high contribution to the local households in Cox's Bazar (see chapter 6 results).

Table 5. 5: Tourism Spend by Category

| Accommodation | BD Tk. | BD Tk. | % of Individual Spend | % of Total Spend |
|-----------------------------|---------|---------|-----------------------|------------------|
| Hotels | 466,200 | | 49.3 | |
| Motels | 23,900 | | 2.5 | |
| Guest Houses | 6,000 | | 0.6 | |
| Rented Apartments | 20,999 | 517,099 | 2.2 | 54.7 |
| Food | | | | |
| Restaurant-Outside of Hotel | 266,350 | | 28.2 | |
| Hotel Restaurant | 18,000 | | 1.9 | |
| Fast Food | 10,000 | | 1.1 | |
| Street Food | 7,265 | | 0.8 | |
| Groceries-Food | 6,000 | | 0.6 | |
| Tea Shops | 550 | | 0.1 | |
| Others | 19,340 | 327,505 | 2.0 | 34.6 |
| Local Transportation | | | | |
| Taxi | 11,233 | | 1.2 | |
| Tuk Tuk | 8,038 | | 0.8 | |
| Rickshaw | 5,243 | 24,515 | 0.6 | 2.6 |
| Souvenir/Handicrafts | | | | |

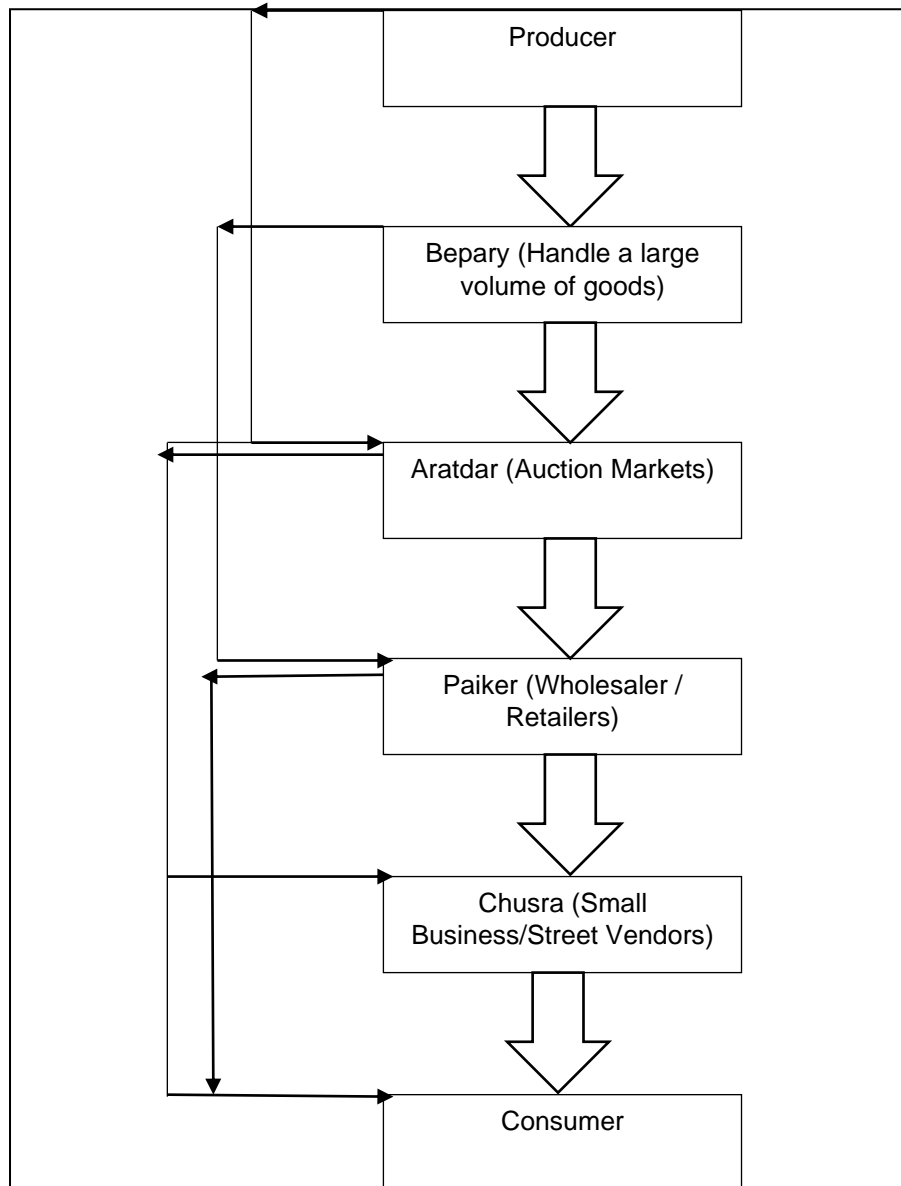
| | | | | |
|----------------------------|---------|---------|-------|-------|
| Dried Fish | 29,958 | | 3.2 | |
| Shells Handicrafts | 10,483 | | 1.1 | |
| Jewellery Handicrafts | 7,600 | | 0.8 | |
| Textile Handicrafts | 5,000 | | 0.5 | |
| Bamboo Handicrafts | 3,583 | | 0.4 | |
| Ceramic Handicrafts | 1,300 | | 0.1 | |
| Others | 500 | 58,425 | 0.1 | 6.2 |
| Tours and Beach Activities | | | | |
| Jeep Tour | 9,900 | | 1.0 | 0.0 |
| Hiring an Umbrella | 5,190 | | 0.5 | |
| Hiring a Photographer | 2,320 | | 0.2 | |
| Rickshaw Tour | 700 | | 0.1 | |
| Horse Riding | 50 | 18,160 | 0.0 | |
| Total tourist Spend | 945,704 | 945,704 | 100.0 | 100.0 |

Source: Fieldwork, August 2017

5.3 Tourism Supply Chain Mapping

Figure 5.1 maps the supply chain relating to dried fish, restaurants, souvenirs and handicrafts segments of the tourism value chain in Cox's Bazar. The supply chain in Bangladesh differs from most developed economies due to the high number of intermediaries (*beparis, aratdar paiker and chusras*) involved.

Figure 5. 1: Supply Chain Mapping Framework-Cox's Bazar



Source: Author's Own Work 2019

The research sample comprised a total of 27 suppliers which were categorised under five headings – dried fish, fresh fish, rice, chutney and handicrafts. The dried fish suppliers are located in Nazirar Tek and the fresh fish suppliers' location is Boro Bazar, the rice and chutney suppliers are based on Zom Zom Market and the handicrafts suppliers are located in Zinuk Market. The first link in the supply chain is the *bepari* defined as a person or group of people who handle a large volume of goods without any license. A *bepari* could be a local or

non-local businessperson. A supplier may directly supply goods to the aratdar which is an auction market for local produce and goods. A bepari may also distribute supplies to the aratdar or to a wholesaler referred to as a paiker. The paiker holds a large or small volume of goods to distribute to the chusra traders who are local small businesses and street vendors. A chusra channel may directly distribute goods to the final consumer. In Cox's Bazar the aratdar is the main distribution channel within the supply chain and the supply of goods flows through the paiker and chusra intermediaries before reaching the consumer. Table 5.6 illustrates a monthly income statement incorporating 27 suppliers in five categories.

Table 5. 6: Monthly Income and Expenditure Statement Suppliers

| Gross Profit by product (million) | Dry Fish | Fresh Fish | Rice | Chutney | Handi-crafts | Total |
|-----------------------------------|----------|------------|------|---------|--------------|-------|
| Number of Suppliers | 10 | 6 | 1 | 4 | 6 | 27 |
| Revenue | 97.7 | 8.4 | 1.1 | 0.6 | 0.5 | 108.1 |
| Cost of Sales | 73.2 | 6.2 | 1.0 | 0.1 | 0.0 | 80.5 |
| Gross Profit | 24.4 | 2.2 | 0.0 | 0.5 | 0.5 | 27.6 |
| Gross Profit margin | 25.0% | 26.3% | 2.9% | 87.0% | 95.1% | 25.5% |

Source: Fieldwork, August 2017

Analysis of the data in table 5.6 demonstrates that the total average gross profit margin is 25.5 per cent and the highest gross profit margin occurs in the handicrafts sector (95.1 percent). However, some costs of sales items were not available and consequently some cost of sales items were adjusted manually based on the gross revenue. The lowest revenue generated was for the rice suppliers. The dried fish sector also generates a relatively high profit margin (25 per cent) but the cost of sales is very low. The chutney sector generates a profit margin of 87 per cent.

Picture 5. 1: Fish Suppliers in Cox's Bazar.



Picture 1: Fishermen unloading fish at the market.



Picture 2: Fresh fish at the market.



Picture 3: Dried fish processing at Nazirar Tek.

Source: Fieldwork Data Collection, August 2017

5.4 Tourism Value Chain: Accommodation

This section analyses the three major areas of the beach accommodation (hotels 0 stars to 5 stars, guest houses and bed & breakfasts) within the tourism value chain. According to Mamun et al. (2013) there are a total of 220 hotels and guest houses providing accommodation within Cox's Bazar and the majority of these hotels are officially registered but a few hotels are operating without any registration. Firstly, there is an overview of the general background of the accommodation types, a star rating, occupancy rate and male and female

employment participation within the sample size of 20. Secondly, monthly income and expenditure statements relating to accommodation providers are analysed, demonstrating the accommodation actors' monthly revenue, cost, income and profit. Thirdly, the tourists' spending on accommodation and the accommodation cost of sales are discussed. Finally, there is an analysis of the levels of linkages and leakages in the accommodation sector of the tourism value chain.

5.4.1 Business Characteristics

The total sample size for the accommodation sector of the tourism value chain was 20 establishments composed of 17 hotels, 2 guest houses and one bed & breakfast business. Table 5.7 illustrates the breakdown of the types of accommodation. The largest component of the accommodation sector is hotels which account for 85 per cent of the sample. The total number of rooms in the hotel sample is 1,275 and the total number of beds is 2,053 incorporating single beds, double beds, and executive beds. The data indicates that the occupancy rate for hotels was only 27.5 per cent due to the research being conducted in the off-peak season. The average room rates were BD Tk. 971. Guest houses comprised 10 per cent of the sample and provided 70 rooms and 125 beds. The occupancy rate was significantly higher than the hotel sector, but the room rate was considerably lower at BD Tk. 471 per night. During the off-peak season, the bed and breakfast businesses are heavily dependent on younger male guests (mainly students). The one bed & breakfast business in the sample provided a total of 8 rooms and had an occupancy level of 75 per cent. Analysis of the results indicates that the accommodation actors in the tourism value chain operate in a highly competitive environment and that margins are relatively low in the off-peak season.

Table 5. 7: Business Characteristics: Accommodation

| Type | No. | Share % | Beds | Rooms | Occupancy Rate (%) | Room Rate (BD TK.) |
|-----------------|-----|---------|-------|-------|--------------------|--------------------|
| Hotel | 17 | 85.0 | 2,053 | 1,275 | 27.5 | 971 |
| Guest House | 2 | 10.0 | 125 | 70 | 50.0 | 471 |
| Bed & Breakfast | 1 | 5.0 | 8 | 8 | 80.0 | 2,344 |
| Total | 20 | 100 | 2,186 | 1,353 | 29 | 953 |

Source: Fieldwork, August 2017

5.4.2 Star Rating Types of Accommodation

A tourism accommodation rating system is coordinated by the Cox's Bazar Hotel Association using a range from 0-star hotels to 5-star hotels. A breakdown of the accommodation providers in the research sample based on their official rating is presented in table 5.8. The accommodation providers in a two-star category comprise 50 per cent of the sample and three-star hotels comprise 25 per cent. There were no four-star establishments in the research sample.

Table 5. 8: Star Rating

| Star Rating | Number | Number % | Beds | Beds % |
|-------------|--------|----------|-------|--------|
| 0 | 1 | 5.0 | 120 | 5.5 |
| 1 | 3 | 15.0 | 235 | 10.8 |
| 2 | 10 | 50.0 | 1,238 | 56.6 |
| 3 | 5 | 25.0 | 383 | 17.5 |
| 4 | 0 | 0.0 | 0 | 0.0 |
| 5 | 1 | 5.0 | 210 | 9.6 |
| Total | 20 | 100.0 | 2,186 | 100.0 |

Source: Fieldwork, August 2017

5.4.3 Occupancy Rate

In the previous section (section 5.4.1), it was noted that the occupancy rate in the sample was low due to seasonal factors. The results in table 5.9 below demonstrate that the average occupancy rate was 29.6 per cent and that for 14 accommodation providers the occupancy rate was below 25 per cent. Only 3 accommodation businesses had occupancy rate between 25 to 50 per cent and 2 businesses had an occupancy rate between 50 to 75 per cent. The hotel which had the highest occupancy rate was in the luxury five-star category which

may reflect the relative scarcity of high-end accommodation providers in the resort.

Table 5. 9: Occupancy Rate

| Occupancy rate | Number | Number % |
|---------------------|--------|----------|
| <= 25% | 14 | 70.0 |
| >25% and <=50% | 3 | 15.0 |
| >50% and <=75% | 2 | 10.0 |
| <=100% | 1 | 5.0 |
| Total/Avg. | 20 | 100% |
| Avg. Occupancy Rate | | 29.6% |

Source: Fieldwork, August 2017

5.4.4 Male and Female Employment

Analysis of the research illustrated in table 5.10 shows that a total of 619 people was employed within the 20 accommodation providers in the sample. However female labour market participation was less than 10 per cent. During the fieldwork, it was observed that the 5-star hotel had the highest level of female staff, which may reflect the impact of a dedicated human resources function. However, even in this environment there was evidence of delineated gender roles, with the majority of female staff employed in laundry and cleaning occupations. Lack of skills and the perceived unsuitability of the job for women were the two reasons cited by hotel managers in this sample for the gender gap in their establishments.

Table 5. 10: Male and Female Employment

| Gender | Number | Number % |
|-------------------------|--------|----------|
| Male | 561 | 90.6 |
| Female | 58 | 9.4 |
| Total | 619 | 100.0 |
| Average number of staff | 31 | |

Source: Fieldwork, August 2017

5.4.5 Monthly Expenditure

In this section data relating to revenue, cost of sales and net profits for the accommodation providers in the sample are presented (table 5.11). Analysis of

the results in table 5.11 illustrates that the total monthly revenue for the sample is BD Tk. 11,680,645 and the average total revenue is BD Tk. 3,893,548. The total monthly costs are 57.8 per cent of revenue. Out of the total revenue, a total of BD Tk. 3,787,000 is allocated to staff costs which are directly linked to local households as income.

Table 5. 11: Monthly Income and Expenditure Statement

| | Total (BD Tk.) | Average (BD Tk.) | Share % |
|-----------------------|----------------|------------------|---------|
| Revenue | 11,680,645 | 3,893,548 | 100.0 |
| Costs | | | |
| Staff costs | 3,787,000 | 1,262,333 | 32.4 |
| Linens Cost | 423,500 | 141,167 | 3.6 |
| Guest room supplies | 644,500 | 214,833 | 5.5 |
| Water for guest rooms | 197,000 | 65,667 | 1.7 |
| Cleaning cost | 117,000 | 39,000 | 1.0 |
| Uniforms | 18,833 | 6,278 | 0.2 |
| Others | 16,000 | 5,333 | 0.1 |
| Local Business Tax | 46,667 | 15,556 | 0.4 |
| Electricity | 907,417 | 302,472 | 7.8 |
| Generator | 511,000 | 170,333 | 4.4 |
| Miscellaneous | 77,000 | 25,667 | 0.7 |
| Total costs | 6,745,917 | 2,248,639 | 57.8 |
| Net Operating Income | 4,934,728 | 1,644,909 | 42.2 |
| VAT | 1,143,704 | 381,235 | 9.8 |
| Corporation tax | 947,756 | 315,919 | 8.1 |
| Net profit | 2,843,268 | 947,756 | 24.3 |

Source: Fieldwork, August 2017

The table 5.11 above indicates that the staff wages comprise the highest cost (32.4 per cent) for the accommodation businesses. Other costs are guest room supplies and linens which form 5.5 per cent and 3.6 per cent respectively. The costs relating to local business tax, electricity supply and generator supplies constitute 12.6 per cent. The net operating income is 42.2 per cent however, after deduction of VAT (9.8 per cent) and income tax (8.1 per cent) the net profit is 24.3 per cent or BD Tk. 2,843,268.

5.4.6 Direct and Indirect Contribution

Data relating to the levels of direct and indirect contributions from the accommodation providers to local households is presented in table 5.12. Direct contribution to local households' incomes consists of staff wages and net profit. Cost of sales constitutes an indirect contribution of 50 per cent. The cost of sales includes linens cost, soap, shampoo and water bottles for guests' supplies, cleaning materials and uniforms.

Table 5. 12: Direct and Indirect Contribution

| | BD Tk. | Direct (%) | Indirect (%) | Direct (BD Tk.) | Indirect (BD Tk.) |
|---------------|------------|------------|--------------|-----------------|-------------------|
| Staff costs | 3,787,000 | 100 | 0 | 3,787,000 | 0 |
| Cost of sales | 1,265,000 | 0 | 50 | 0 | 632,500 |
| Utilities | 1,418,417 | 0 | 0 | 0 | 0 |
| Misc. | 275,500 | 0 | 0 | 0 | 0 |
| VAT | 1,143,704 | 0 | 0 | 0 | 0 |
| Corp. Tax | 947,756 | 0 | 0 | 0 | 0 |
| Net profit | 2,843,268 | 100 | 0 | 2,843,268 | 0 |
| Total | 11,680,645 | 56.8 | 5.4 | 6,630,268 | 632,500 |

Source: Fieldwork, August 2017

The above table 5.12 highlights that the direct and indirect contributions are estimated based on assumptions due to lack of supplier data as it was impossible to collect all supplier data. Tax payments (VAT and Corporation Tax) can be classified as leakages because the payment is made to Bangladesh Revenue Authority and does not stay in Cox's Bazar. The total direct contribution is 56.8 per cent and the total indirect contribution is 5.4 per cent.

5.4.7 Linkages and Leakages

This section analyses the primary research data relating to linkages and leakages in the accommodation segment of the tourism value chain in Cox's Bazar. The data illustrated in table 5.13 presents the cost items for the accommodation sample and estimates the level of linkages and leakages for

each item. Meyer (2010) notes that developing countries tend to have relatively low level of linkages because of a lack of quality and quantity of goods and services. The data in table 5.13 tends to support this assertion as the total rate of linkages is only 9 per cent. The highest level of linkages is from cleaning costs due to fact that accommodation cleaning products are locally sourced. Costs associated with linen are estimated to generate 50 per cent linkages and 50 per cent leakages. The reason for this appears to be based on the fact that small and medium-sized accommodation providers source linens from local suppliers and the 3 stars to 5-star accommodation providers' source linen from other regions in Bangladesh. The rate of local leakages for guest room supplies such as soap and shampoo is 50 per cent and this is due to the demand for branded products and high-quality standards which are not available in Cox's Bazar. The supply of uniforms has no local linkage and 50 percent of items in this category are imported. The highest level of leakages is from local business taxes electricity payments because the tax revenue goes to the Bangladesh Tax Authority and in Cox's Bazar there is no electricity supplier. In the accommodation sector, the level of total leakages is 16.3 per cent due to the sourcing of bulk items such as linens, guest room supplies, water and uniforms from regions outside Cox's Bazar. The total level of leakages from Cox's Bazar is 14.4 per cent and it can be observed that there is a low percentage of imports.

Table 5. 13: Linkages and Leakages

| | Costs (BD Tk.) | Revenue (%) | Linkage (%) | Leakage (BD %) | Import Leakage (%) | Total Leakage (%) |
|-------------|-------------------|----------------|----------------|-------------------|--------------------------|-------------------------|
| Linens Cost | 423,500 | 3.6 | 50.0 | 0.0 | 50.0 | 50.0 |
| Toiletries' | 644,500 | 5.5 | 50.0 | 50.0 | 0.0 | 50.0 |
| Water | 197,000 | 1.7 | 50.0 | 50.0 | 0.0 | 50.0 |
| Cleaning | 117,000 | 1.0 | 100.0 | 0.0 | 0.0 | 0.0 |
| Uniforms | 18,833 | 0.2 | 0.0 | 50.0 | 50.0 | 100.0 |
| Others | 16,000 | 0.1 | 50.0 | 50.0 | 0.0 | 50.0 |
| Local Tax | 46,667 | 0.4 | 0.0 | 100.0 | 0.0 | 100.0 |
| Electricity | 907,417 | 7.8 | 0.0 | 100.0 | 0.0 | 100.0 |
| Generator | 511,000 | 4.4 | 50.0 | 50.0 | 0.0 | 50.0 |
| Misc. | 77,000 | 0.7 | 50.0 | 50.0 | 0.0 | 50.0 |
| Total/Avg. | 2,958,917 | 25.3% | 9.0% | 14.4% | 1.9% | 16.3% |

Source: Fieldwork, August 2017

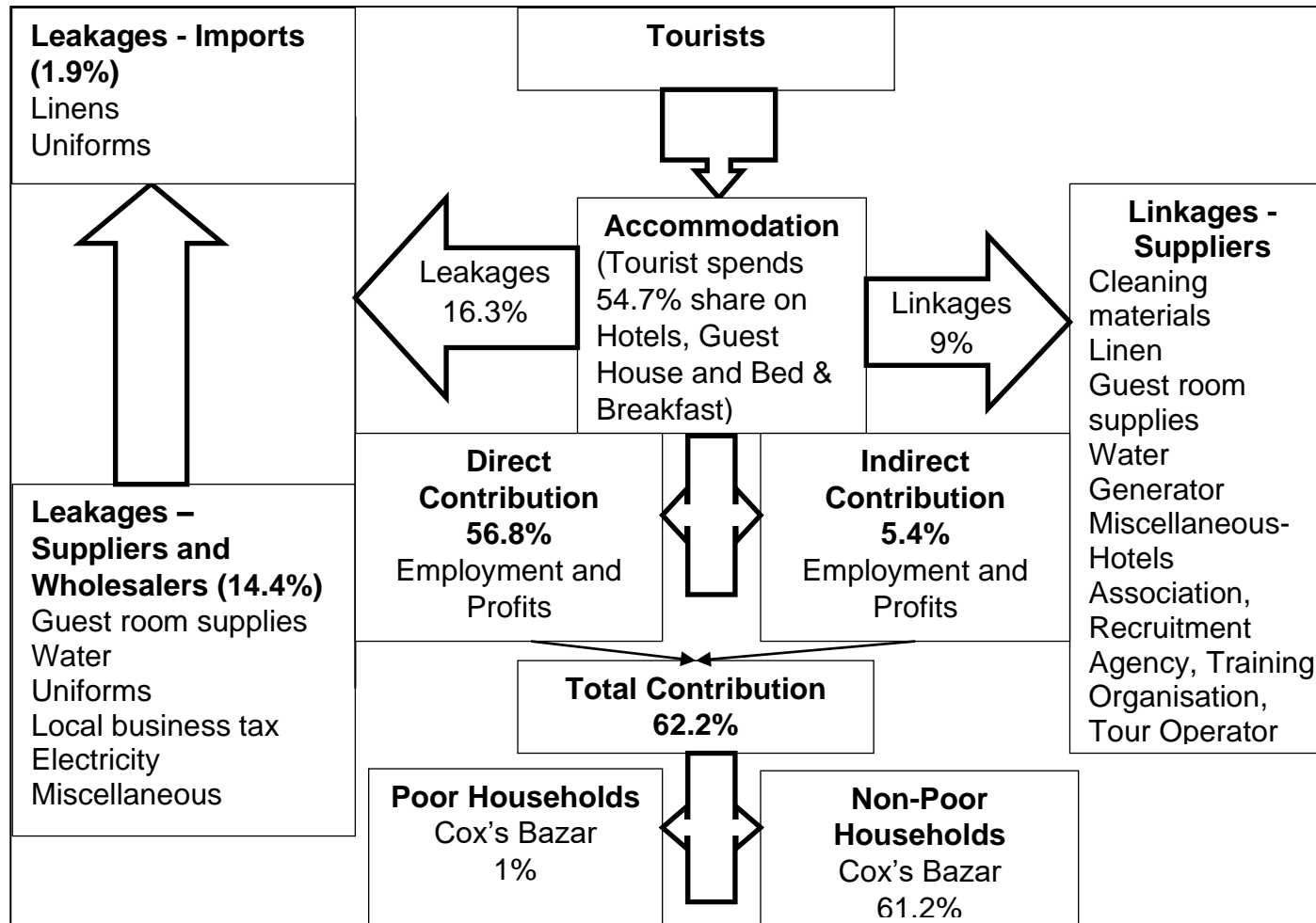
5.4.8 Tourism Value Chain Mapping Framework

Figure 5.2 illustrates that the framework for tourism value chain relating to accommodation. The analysis shows that the cost items have a significant impact on suppliers and the local economy. Accommodation accounts for 54.7 per cent of tourists' total expenditure. The analysis indicates that there are a diverse range of stakeholders who are directly and indirectly involved within the accommodation sector. The local retailers and brokers supply materials such as linens, cleaning products, guest room supplies and water to the accommodation sector. However, due to demand for high quality products the accommodation providers need to source products from outside Cox's Bazar. Figure 5.2 shows that the leakages related to imports is only 1.9 per cent. The total linkages level is 9 per cent and includes miscellaneous goods and services such as tour operators, local government authority, recruitment agencies, and tourism training organisations.

The framework shows that there are three types of contributions from the accommodation sector such as a direct contribution of (56.8 per cent) which goes to the households as a salary or wages. The indirect contribution (5.4 per

cent) goes to the households as a result of suppliers' linkages. The framework also demonstrates that 54.7 of tourists' expenditure relates to the accommodation sector. This figure constitutes a contribution of 62.2 per cent for households in Cox's Bazar. However, the contribution to poor households' incomes is only 1 per cent.

Figure 5. 2: Tourism Value Chain Framework: Accommodation



Source: Author's Own Work 2019

5.5 Tourism Value Chain: Restaurants

This section provides data relating to the size of the restaurant segment of the tourism value chain in Cox's Bazar and details relating to gender based labour market participation. Detailed information is provided relating to monthly income and expenditure statements and direct and indirect contributions to local households. Finally, there is an examination of linkages and leakages in the restaurant tourism value chain and a mapping of the restaurant value chain. 22 restaurants were included in the scope of the primary research for this segment of the tourism value chain. Food is an important part of Bangladesh culture and Cox's Bazar is a culinary destination with many specialties in seafood. In table 5.14 the results show that the majority of tourists tend to dine outside of their hotel's restaurant. Tourists' expenditure on food constitutes 20.8 per cent of their total spend.

5.5.1 Seating Capacity

The size of the restaurants in the research sample ranges from 30 to 110 seats table 5.14 indicates that seven restaurants offer between 60 to 80 seats where the restaurant has a large capacity for breakfast, lunch and dinner. Six restaurants offer seating from 20 to 60 and only one restaurant has a capacity of more than 100 seats.

Table 5. 14: Number of Seats: Restaurants

| Seats | Number | Number % |
|-------------------------|--------|----------|
| <=20 seats | 2 | 9.1 |
| >20 and <=40 | 6 | 27.3 |
| >40 and <=60 | 6 | 27.3 |
| >60 and <=80 | 7 | 31.8 |
| >80 and <=100 | 0 | 0.0 |
| >100 and <=110 | 1 | 4.5 |
| Total | 22 | 100% |
| Average number of seats | 55 | |

Source: Fieldwork, August 2017

5.5.2 Male and Female Employment

The primary data collected during fieldwork (table 5.15) indicate that a total of 320 employees are included in the research sample. The results indicate a clear gender gap in terms of labour market participation in the restaurant sector in Cox's Bazar. In the sample overall, the level of female participation was only 6.6%. This reflects existing literature (Kabeer 2011) which notes that women are frequently confined to the domestic space and the traditional view that men should be the main income provider. The discussions in the interviews supported much of the literature on the influence of gender constraints and social norms (Kabeer 2001; Bridges et al. 2011).

Table 5. 15: Male and Female Employment

| Gender | Number | Number % |
|--------|--------|----------|
| Male | 299 | 93.4 |
| Female | 21 | 6.6 |
| Total | 320 | 100.0 |

Source: Fieldwork, August 2017

5.5.3 Monthly Expenditure

Data relating to restaurants' monthly income from the sample are presented in table 5.16. The results show that the overall total of 22 restaurants generate only 0.8 per cent net profit which equates to BD Tk. 44,736. There were several reasons underlying this low profit margin such as off-peak season, the high-level cost of sales, a highly competitive market, the increased competition from fast food outlets and high maintenance costs. The results also indicate that the staff costs and the cost of sales are high at 39.8 per cent and 20.5 per cent respectively. The cost of sales is high because of lack of supplies facilities locally except for supplies of fish. Groceries, vegetables, meat, and bottled water are not locally sourced, and the restaurants are dependent on suppliers.

The cost relating to water is relatively high at 11.7 per cent because guests demand bottled water and the bottled water is outsourced.

Table 5. 16: Monthly Income and Expenditure Statement

| | Total (BD Tk.) | Average (BD Tk.) | Share % |
|----------------------|----------------|------------------|---------|
| Revenue | 5,320,000 | 241,818 | 100.0 |
| Costs | | | |
| Cost of sales | 1,089,300 | 49,514 | 20.5 |
| Staff costs | 2,116,000 | 96,182 | 39.8 |
| Water | 620,475 | 28,203 | 11.7 |
| Gas | 425,500 | 19,341 | 8.0 |
| Electricity | 428,200 | 19,464 | 8.0 |
| Sewage | 20,600 | 936 | 0.4 |
| Waste Disposal | 50,000 | 2,273 | 0.9 |
| Local Business Tax | 41,417 | 1,883 | 0.8 |
| Miscellaneous | 136,300 | 6,195 | 2.6 |
| Total costs | 4,927,792 | 223,991 | 92.6 |
| Net Operating Income | 392,208 | 17,828 | 7.4 |
| VAT | 332,560 | 15,116 | 6.3 |
| Income tax | 14,912 | 678 | 0.3 |
| Net profit | 44,736 | 2,033 | 0.8 |

Source: Fieldwork, August 2017

5.5.4 Direct and Indirect Contribution

Table 5.17 illustrates data relating to the direct and indirect contributions to local households. The restaurants generate a revenue of BD Tk. 5,320,000. The staff costs' direct contribution is 100 per cent because the money goes to local households directly. A 5.7 per cent indirect contribution relates to the cost of sales because the restaurants require supplies of food items and there is a high level of linkages with the local supply chain in Cox's Bazar. However, not all suppliers were included for the scope of this study due to the lack of information availability and clear data transparency. The calculation is based on the fact that an estimated 75 per cent of cleaning suppliers are sourced locally and the remaining 25 per cent are from other regions in Bangladesh.

Table 5. 17: Direct and Indirect Contribution

| | BD Taka | Direct % | Indirect % | Direct (BD Tk.) | Indirect (BD Tk.) |
|---------------|-----------|----------|------------|-----------------|-------------------|
| Staff costs | 2,116,000 | 100 | 0 | 2,116,000 | 0 |
| Cost of sales | 1,759,775 | 0 | 17 | 0 | 303,859 |
| Utilities | 874,300 | 0 | 0 | 0 | 0 |
| Misc. | 177,717 | 0 | 0 | 0 | 0 |
| VAT | 332,560 | 0 | 0 | 0 | 0 |
| Corp.Tax | 14,912 | 0 | 0 | 0 | 0 |
| Net profit | 44,736 | 100 | 0 | 44,736 | 0 |
| Total | 5,320,000 | 40.6 | 5.7 | 2,160,736 | 303,859 |

Source: Fieldwork, August 2017

5.5.5 Linkages and Leakages

Table 5.18 illustrates that the total rate of linkages from the restaurant sector is 18.5 per cent. The total leakages are relatively high in that out of a total of 34.4 per cent, 30.3 per cent is leakages from the local economy and 4.1 per cent are imports. There are several reasons for the low level of linkages including lack of training and staff development, the lack of awareness of local food, supply chain management and good practice, lack of focus on distribution channels, lack of focus of working with local stakeholders to maximise the local economic contribution. Table 5.18 shows that the highest rate of linkage is associated with waste disposal services because all of the 22 restaurants in the sample use the local waste disposal facilities and all machinery and staff are locally sourced. The highest leakages are utilities (gas and electricity) and local business tax payments which flow to the Bangladeshi national authority.

Table 5. 18: Linkages and Leakages

| | Cost (BD Tk.) | Revenue (%) | Linkage (%) | Leakage (BD%) | Import Leakage (%) | Total Leakage (%) |
|---------------|------------------|----------------|----------------|------------------|-----------------------|-------------------------|
| Cost of sales | 1,089,300 | 20 | 50 | 30 | 20 | 50 |
| Water | 620,475 | 11.7 | 50 | 50 | 0.0 | 50 |
| Gas | 425,500 | 8.0 | 0.0 | 100 | 0.0 | 100 |
| Electricity | 428,200 | 8.0 | 0.0 | 100 | 0.0 | 100 |
| Sewage | 20,600 | 0.4 | 50 | 50 | 0.0 | 50 |
| Wastage | 50,000 | 0.9 | 100 | 0.0 | 0.0 | 0.0 |
| Local Tax | 41,417 | 0.8 | 0.0 | 100 | 0.0 | 100 |
| Misc. | 136,300 | 2.6 | 50 | 50 | 0.0 | 50 |
| Total/Avg. | 2,811,792 | 52.9% | 18.5% | 30.3% | 4.1% | 34.4% |

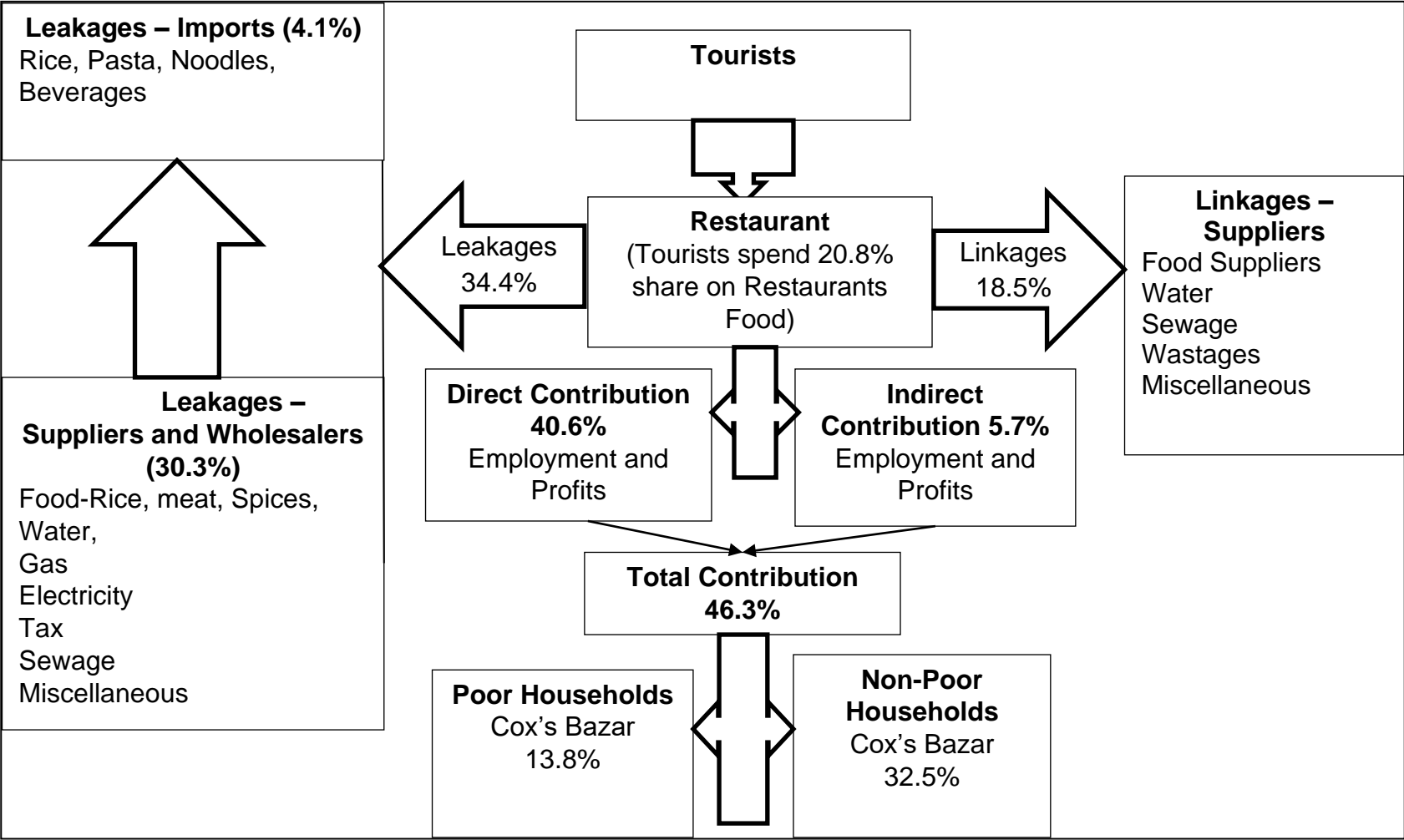
Source: Fieldwork, August 2017

5.5.6 Tourism Value Chain Mapping Framework

Figure 5.3 illustrates the complexity of the tourism value chain in the restaurant sector. During the fieldwork data collection process, it was observed that a majority of the customers were local, and the food items were predominantly rice, fish, beef, mutton, dal, and vegetables dishes. Figure 5.3 shows that there is a significantly high level of leakage in Cox's Bazar. The total leakage is 34.4 per cent of which 30.3 per cent is from the local economy and 4.1 per cent relates to imports. There are several reasons for such a high level of leakages. The high level of demand and low level of supply contributes to an increased rate of leakage because apart from seafood, other culinary supplies are sourced from outside the resort. Other restaurant items are imported from abroad, such as rice, pasta, noodles, and beverages. The linkage margin is lower at 18.5 per cent due to the low level of supply chain management facilities and the lack of local supplies and availability of stock. In addition, tourist demand is very unpredictable due to weather conditions and periods of political instability. Expenditure on restaurants accounts for 20.8 per cent of tourists overall spend and the total contribution (direct and indirect) for local households is 46.3 per cent. This comprises 40.6 per cent of direct contribution from staff wages,

salaries, and owners' profits and 5.7 per cent of indirect contribution from local suppliers and other stakeholders. Tourists' expenditure on the restaurant sector contributes 32.5 per cent income for non-poor households and 13.8 per cent for poor households' incomes. The analysis shows that the restaurant sector produces significant levels of benefit for poor households.

Figure 5. 3: Tourism Value Chain Framework: Restaurants



Source: Author's Own Work 2019

5.6 Tourism Value Chain: Street Food Vendors

A definition of street vendors or hawkers can be classified as a person who offers goods and services to sales without any building or any premises. The street vendors may occupy a space on the street, pavements or public or private spaces (Bhowmik 2010). Lyons and Snoxell (2005) define street vendors as businesses without trading permits, trading informally outside of the business premises and not paying local or national taxes. Structured questionnaires were administered to a sample size of 27 street vendors. A total of nine respondents identified under the category of food, and another 18 identified under the category of handicrafts vendors. This section focuses specifically on street food vendors while the handicrafts vendors are discussed in Section 5.10. The first part of this section outlines the street food vendors' demographic profile, formal status and location of the business. This is followed by a detailed analysis of monthly income and expenditure statements and direct and indirect contributions to local households. Finally, there is an examination of linkages and leakages relating to street food vendors and a mapping of the street food vendor value chain.

5.6.1 Business Characteristics

In Table 5.19 it can be seen that all street vendors are self-employed, and that there is only one staff member per business. Of the nine food vendors, seven employees are male, and two employees are female. Over 88 per cent of the businesses operate within the informal economy. Food products such as dry food and fruit are locally sourced.

Table 5. 19: Business Characteristics: Street Food Vendors

| Gender | Number | Number % |
|----------|--------|----------|
| Male | 7 | 77.8 |
| Female | 2 | 22.2 |
| Informal | 8 | 88.9 |
| Formal | 1 | 11.1 |
| Total | 9 | 100% |

Source: Fieldwork, August 2017

5.6.2 Monthly Expenditure

An analysis of tourist expenditure indicates that tourists spend less than 1 per cent on street food. The average revenue of street food vendors is BD Tk. 23,121 which represents a significant sales volume. The revenue is associated mainly with dry food products such as nuts, samosa, chotpoti, zalmuri, pan (local snacks), and fruit such as amra, banana, guava, and coconut (local fruits). The average cost of sales is BD Tk. 15,094 and is mostly associated with local ingredients such as masala (spice) for zalmuri, chotpoti, amra, guava and straw for coconut.

Each street vendor has an average of 60 tourist customers per day. The fees or rents applied to the street vendors by the local management beach committee may be classed as informal expenses because there were no records available that the money goes to the local tax authority. The other major costs are the local police fees which are BD Tk. 11,935, and the average is BD Tk. 1,326 per vendor per month. The vendors revealed that the local police collect a total of 40 BD Tk. fees on a daily basis from each vendor. The local police collect their fees from vendors twice a day, the first payment of BD Tk. 20 is in the morning and the second one is in the evening. The vendors' working schedules are from 11am to approximately 11pm. Although street vendors' businesses are part of the informal economy, more than 6 per cent of costs are associated with local police fees and local beach management committee (rent and fees) and this

indicates that the net profit margin should have been more than 18 per cent were it not for these payments.

Table 5. 20: Monthly Income and Expenditure Statement

| | Total (BD Tk.) | Average (BD Tk.) | Share % |
|----------------------|----------------|------------------|---------|
| Revenue | 208,088 | 23,121 | 100.0 |
| Costs | | | |
| Cost of sales | 135,850 | 15,094 | 65.3 |
| Local police fees | 11,935 | 1,326 | 5.7 |
| Rent/Fees | 1,883 | 209 | 0.9 |
| Food Cost | 5,270 | 586 | 2.5 |
| Miscellaneous | 15,715 | 1,746 | 7.6 |
| Total costs | 170,653 | 18,961 | 82.0 |
| Net Operating Income | 37,434 | 4,159 | 18.0 |
| VAT | 0 | 0 | 0.0 |
| Corporation tax | 0 | 0 | 0.0 |
| Net profit | 37,434 | 4,159 | 18.0 |

Source: Fieldwork, August 2017

5.6.3 Direct and Indirect Contribution

An analysis of the total revenue of BD Tk. 208,088 generated by nine street food vendors. (table 5.21) indicates that the direct contribution to households from staff costs is zero because all vendors are self-employed. The food, local police fees, and other items may be estimated as a 50 per cent contribution. The net profit has a 100 per cent direct contribution because all self-employed street vendors contribute their profits to local households and all data relating to street food vendors was collected within the 12 villages research area. The summary of this table shows that the overall direct contribution is 18 per cent and the indirect contribution is 19.4 per cent because the street vendors have strong linkages with the local supply chain because the cost of sales is low and locally sourced.

Table 5. 21: Direct and Indirect Contribution

| | BD Tk. | Direct % | Indirect % | Direct (BD Tk.) | Indirect (BD Tk.) |
|---------------|---------|----------|------------|--------------------|----------------------|
| Cost of sales | 135,850 | 0 | 18 | 0 | 23,815 |
| Utilities | 1,883 | 0 | 0 | 0 | 0 |
| Misc. | 32,920 | 0 | 50 | 0 | 16,460 |
| VAT | 0 | 9 | 50 | 0 | 0 |
| Income tax | 0 | 0 | 0 | 0 | 0 |
| Net profit | 37,434 | 100 | 0 | 37,434 | 0 |
| Total | 208,088 | 18 | 19 | 37,434 | 40,275 |

Source: Fieldwork, August 2017

5.6.4 Linkages and Leakages

Analysis of the research data illustrated in table 5.22 indicates that the level of leakages associated with street food vendors is 29.9 per cent but there are no imports.

Table 5. 22: Linkages and Leakages

| | Costs (BD Tk.) | Revenue (%) | Linkage (%) | Leakage (%) | Import Leakage (%) | Total Leakage (%) |
|----------------------|-------------------|----------------|----------------|----------------|--------------------------|-------------------------|
| Cost of sales | 135,850 | 65.3 | 60.0 | 40.0 | 0.0 | 40 |
| Local police Fees | 11,935 | 5.7 | 100 | 0.0 | 0.0 | 0.0 |
| Rent/Fees | 1,883 | 0.9 | 100 | 0.0 | 0.0 | 0.0 |
| Food Cost | 5,270 | 2.5 | 100 | 0.0 | 0.0 | 0.0 |
| Misc. | 15,715 | 7.6 | 50 | 50 | 0.0 | 50 |
| Total/Avg. | 170,653 | 82 | 52.1 | 29.9 | 0.0 | 29.9 |

Source: Fieldwork, August 2017

The local police fees, beach committee management fees (rent and fees) and food costs are 100 per cent linkages because these categories contribute to local households. The overall rate of linkages is 52.1 per cent. There are several challenges facing the street vendors, such as the local beach committee and local police authority informal fees collection, limited access to the tourists, lack of supply chain reliability, no bank loan or micro finance facilities, lack of distribution channels related to poor transportation, and lack of storage facilities.

Picture 5. 2: Street Food Vendors



Picture-1: Banana Seller.



Picture- 2: Snacks Seller.



Picture-3: Amra (local food) Seller

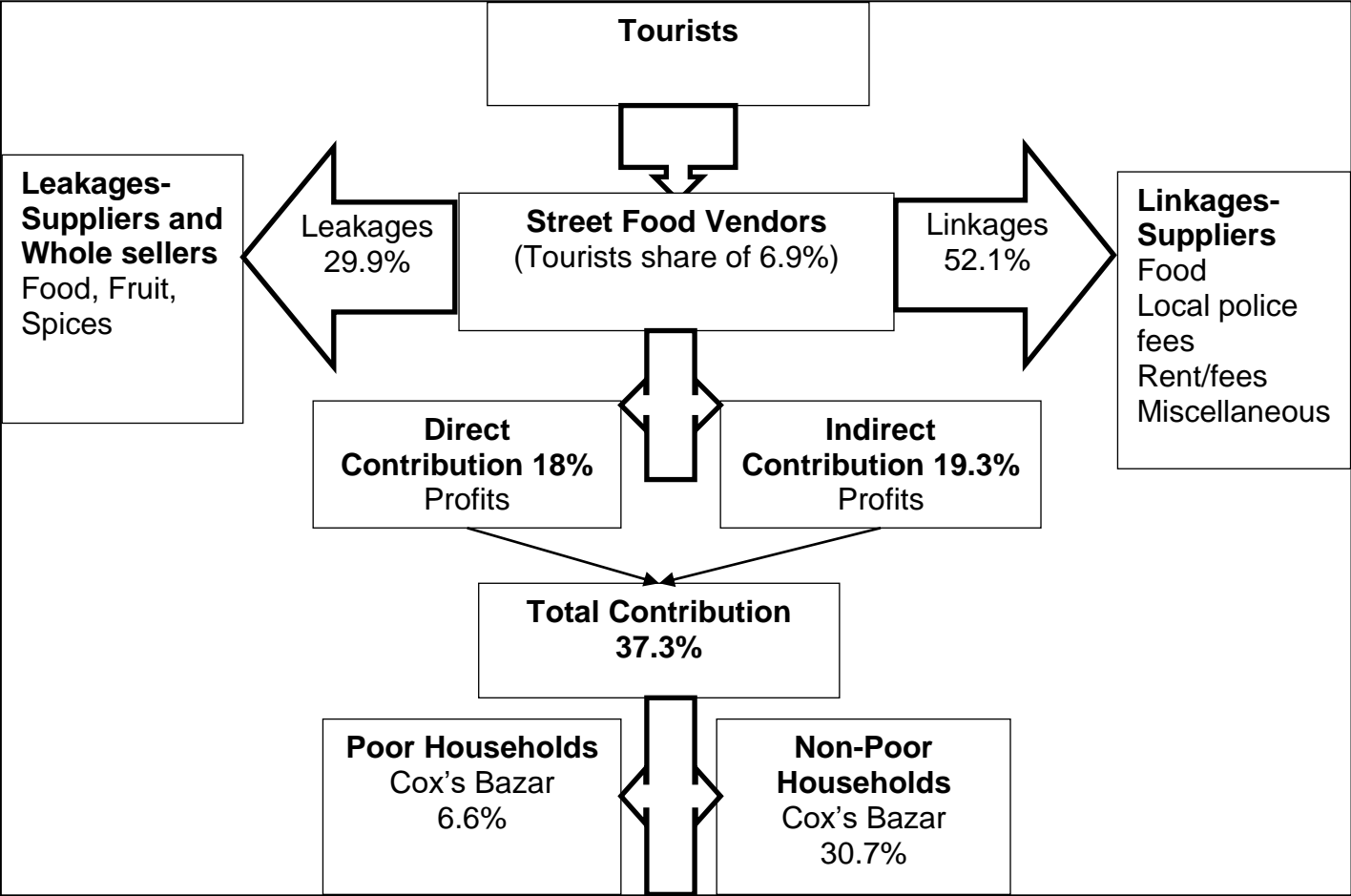
Source: Fieldwork, August 2017

5.6.5 Tourism Value Chain Mapping Framework

Figure 5.4 explains the tourism value mapping framework for street vendors, its relationship with tourist spending and contribution to poor households. The street food vending sector has a low level of leakage – only 29.9 per cent and a high level of linkage of 52.1 per cent. The results indicate that the total contribution (direct and indirect) is 37.3 per cent which comes from 18 per cent direct contribution and 19.3 per cent indirect contribution. The direct contribution is low because it is related to business profits, as the street vendors are self-

employed, and the indirect contribution is high because the cost of sales are low and the majority of cost of sales items are locally sourced. The tourism value chain figure demonstrates that only 6.6 per cent of the tourists' expenditure on street food vendors contributes to poor households and 30.7 per cent goes to non-poor households.

Figure 5. 4: Tourism Value Chain Framework: Street Food Vendors



Source: Author's Own Work 2019

5.7 Tourism Value Chain: Local Beverage Shops

This section examines the local beverage shops in the tourism value chain. Data was gathered from a sample of five beverage shops. Firstly, the characteristics of the beverage shops are outlined. Secondly, there is an analysis of data relating to monthly income and expenditure statements. Thirdly, there is an examination of direct and indirect contribution to local households and finally, there is an analysis of linkages and leakages and a tourism value chain mapping framework for the sector is presented.

5.7.1 Business Characteristics

Table 5.23 shows that the average number of staff members per shop is four and all are male. The local shops main products are beverages such as bottled water, size from half litre to a maximum of two litres; Coke and 7-up where product sizes are also from half litre to a maximum of two litres. These beverages are popular beverages for Cox's Bazar tourists. In most cases, the beverages are domestically sourced from within Bangladesh.

Table 5. 23: Business Characteristics: Local Shops Beverages

| Narrative | Number | Number % |
|----------------------------------|--------|----------|
| Number of questionnaires | 5 | |
| Average number of staff per shop | 4 | |
| Male staff as % of all staff | 21 | 100 |

Source: Fieldwork, August 2017.

5.7.2 Monthly Expenditure

Table 5.24 represents the monthly income and expenditure statement for the five local shops (beverages). The five shops generate total revenues of BD Tk. 2,309,500, and the average revenue per shop is relatively high at BD Tk. 461,900. The cost of sales is above 80 per cent because most of the items are supplied from other locations in Bangladesh. The average per unit cost of sales is BD Tk. 45 and the average retail price per unit of is BD Tk. 65. The staff cost

is comparatively high at 6.1 per cent. The table 5.24 below indicates that the average net profit margin is BD Tk. 31,053 per shop, which makes a positive contribution to households in Cox's Bazar.

Table 5. 24: Monthly Income and Expenditure Statement

| | Total (BD Tk.) | Average (BD Tk.) | Share (%) |
|-----------------------|----------------|------------------|-----------|
| Revenue | 2,309,500 | 461,900 | 100.0 |
| Costs | | | |
| Cost of sales | 1,850,151 | 370,030 | 80.1 |
| Staff Costs | 140,000 | 28,000 | 6.1 |
| Electricity | 27,000 | 5,400 | 1.2 |
| Food | 24,800 | 4,960 | 1.1 |
| Generator | 6,700 | 1,340 | 0.3 |
| License Fees (Formal) | 1,542 | 308 | 0.1 |
| Total costs | 2,050,193 | 410,039 | 88.8 |
| Net Operating Income | 259,307 | 51,861.40 | 11.2 |
| VAT | 52,285 | 10,457 | 2.3 |
| Income tax | 51,756 | 10,351 | 2.2 |
| Net profit | 155,267 | 31,053 | 6.7 |

Source: Fieldwork, August 2017

5.7.3 Direct and Indirect Contribution

Table 5.25 demonstrates that the highest level of direct contributions to local households is from the staff costs and the net profits. The total direct contribution is 12.8 per cent and indirect contribution is 0.6 per cent. The high level of direct contribution may be associated with the high level of staff costs and the net profit margins.

Table 5. 25: Direct and Indirect Contribution

| | BD Tk. | Direct % | Indirect % | Direct (BD Tk.) | Indirect (BD Tk.) |
|------------------------|-----------|----------|------------|-----------------|-------------------|
| Cost of sales | 1,850,151 | 0 | 0 | 0 | 0 |
| Staff Costs | 140,000 | 100 | 0 | 140,000 | 0 |
| Premises and Utilities | 33,700 | 0 | 0 | 0 | 0 |
| Misc | 26,342 | 0 | 50 | 0 | 13,171 |
| VAT | 52,285 | 0 | 0 | 0 | 0 |
| Corp.Tax | 51,756 | 0 | 0 | 0 | 0 |
| Net profit | 155,267 | 100 | 0 | 155,267 | 0 |
| Total/Avg. | 2,309,500 | 12.8 | 0.6 | 295,267 | 13,171 |

Source: Fieldwork, August 2017

5.7.4 Linkages and Leakages

Table 5.26 illustrates that the total rate of leakages is 81.4 per cent. Imports account for 11.1 per cent of leakages and the balance relates to product sourced from other parts of Bangladesh. The majority of the soft drinks are sourced from national and international manufacturers. The linkages rate is only 1.3 per cent which is related to food and local business license fees.

Table 5. 26: Linkages and Leakages

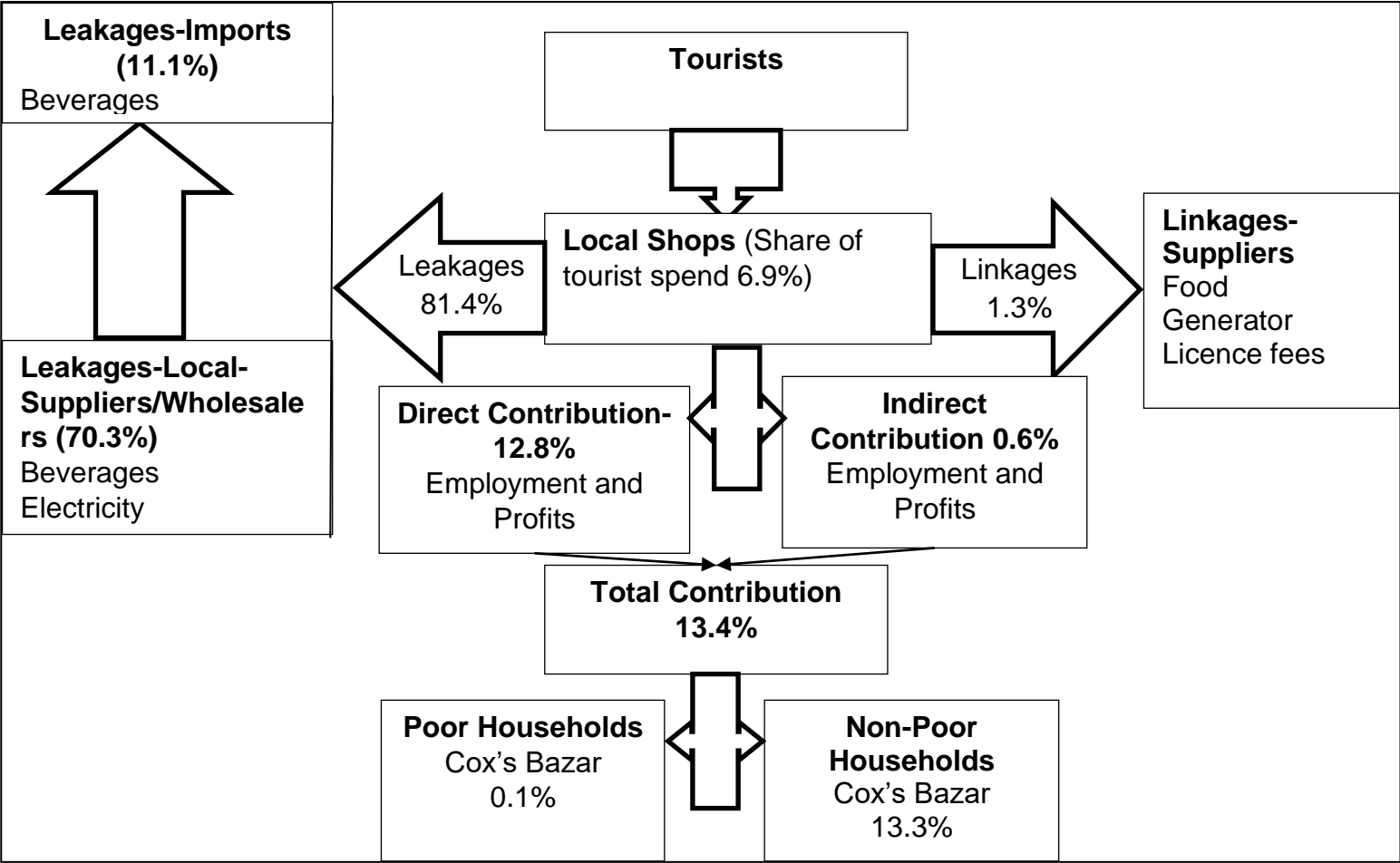
| | Costs (BD Tk.) | Revenue (%) | Linkage (%) | Leakage (%) | Import Leakage (%) | Total Leakage (%) |
|---------------|-------------------|----------------|----------------|----------------|--------------------------|-------------------------|
| Cost of sales | 1,850,151 | 80.1 | 0.0 | 86.1 | 13.9 | 100 |
| Electricity | 27,000 | 1.2 | 0.0 | 100 | 0.0 | 100 |
| Food | 24,800 | 1.1 | 100 | 0.0 | 0.0 | 0.0 |
| Generator | 6,700 | 0.3 | 50 | 50 | 0.0 | 50 |
| License Fees | 1,542 | 0.1 | 100 | 0.0 | 0.0 | 0.0 |
| Total/Avg. | 1,910,193 | 82.7 | 1.3% | 70.3% | 11.1% | 81.4% |

Source Fieldwork, August 2017

5.7.5 Tourism Value Chain Mapping Framework

The proportion of tourists' expenditure on beverages is 6.9 per cent and this results in total monthly income of BD Tk. 2,309,500 for beverages retailers. In terms of linkages and leakages, the sector demonstrates a low rate of linkages at 1.3 per cent. This figure relates primarily to the small number of food items on sale as opposed to beverages. The beverage shops have the highest level of leakages (81.4 per cent) of the actors in the tourism value chain. The total level of contribution to local households is 13.4 per cent, of which 12.8 per cent is direct contribution which derives from staff wages and the profits from the owners. The rate of indirect contribution is 0.6 per cent and relates to local supplier's salaries and profits. The mapping framework (figure 5.5) indicates that there is a negligible contribution (0.1 per cent) to poor households and a (13.3 per cent) contribution to non-poor households.

Figure 5. 5: Tourism Value Chain Framework: Beverages



Source: Author's Own Work 2019

5.8 Tourism Value Chain: Dried Fish Retailers

It is estimated that annual fish production in Cox's Bazar inland water was 33,148 metric tonnes in 2016 (Bangladesh Yearbook of Fisheries Statistics 2017). The value of the dried fish industry in 2016-2017 was BD Tk. 30.19 crore (1 crore denotes 10 million). A dried fish specialty in Cox's Bazar is 'shutki,' which is highly sought after for consumption and as a souvenir or gift. Dried fish production is high, and products are exported after meeting the local and national demand (*Daily Star* Bangladesh 2015). The fish processing occurs in October in Sonadia, Teknaf and Nazirtek in a zone called 'Shukti mahal.' Approximately 100 shutki retailers operate within Cox's Bazar beaches.

The first part of this section outlines the dried fish retailers' business characteristics and analyses monthly income statements. The second part examines the contribution of tourist expenditure on the dried fish sector to households. The third part outlines the linkages and leakages in the dried fish retail sector and the final part presents a mapping value chain framework of this component of the tourism value chain in Cox's Bazar.

5.8.1 Business Characteristics

Table 5.27 shows that a total number of 15 structured questionnaires were administered and the average number of staff per shop is three people. There was considerable variation in the sample with regard to shops size, location, sales volume, and profits. A total of 43 staff were included in the scope of research of which 90 per cent were male. The results once again supported research (Kabeer 2001) which indicates that women's' access to the labour market is limited in many sectors of the economy in Bangladesh. The average revenue per shop is BD Tk. 379,233.

Table 5. 27: Business Characteristics: Dried Fish Retailers

| Details | Number | Number % |
|--|---------|----------|
| Number of questionnaires | 15 | |
| Average number of staff per shop | 3 | |
| Male staff as % of all staff | 39 | 90.7 |
| Female staff as % all staff | 4 | 9.3 |
| Average revenue per shop, month (BD Tk.) | 379,233 | |

Source: Fieldwork, August 2017

5.8.2 Monthly Expenditure

Table 5.28 presents a breakdown of the monthly income and expenditure statements for the dried fish retailers in the sample.

Table 5. 28: Monthly Income and Expenditure Statement

| | Total (BD Tk.) | Average (BD Tk.) | Share % |
|-----------------------|----------------|------------------|---------|
| Revenue | 5,688,500 | 379,233 | 100.0 |
| Costs | | | |
| Cost of sales | 4,371,023 | 291,402 | 76.8 |
| Staff Costs | 482,000 | 32,133 | 8.5 |
| Shop rent | 137,000 | 9,133 | 2.4 |
| Licence Fees (Formal) | 2,350 | 157 | 0.0 |
| Electricity | 77,500 | 5,167 | 1.4 |
| Loan | 7,625 | 508 | 0.1 |
| Others Cost | 205,000 | 13,667 | 3.6 |
| Total costs | 5,282,498 | 352,167 | 92.9 |
| Net Operating Income | 406,002 | 27,067 | 7.1 |
| VAT | 686,266 | 45,751 | 12.1 |
| Corporation tax | - 70,066 | - 4,671 | -1.2 |
| Net profit | - 210,198 | - 14,013 | -3.7 |

Source: Fieldwork, August 2017

The cumulative monthly revenue is BD Tk. 5,688,500 which is relatively high, but the total monthly cost is also high at BD Tk. 5,282,498. Analysis indicates that some costs are comparatively high, such as staff costs (8.5 per cent) as the business is labor-intensive. All dried fish retailers operate in the formal economy and the rate of VAT is 12.1 per cent. However, the net profit margin (BD Tk. is - 210,198) is negative. There are several reasons for the negative profit margin because for some products the cost of sales per unit price is higher than the selling price per unit. The dried fish market is very competitive and concentrated

in one location, and the market trend is unpredictable and fluctuates with the tourist seasons.

5.8.3 Direct and Indirect Contribution

Table 5.29 illustrates that the dried fish sellers in the research sample made a total net loss of BD Tk. 210,198. This table shows that 100 per cent of the staff costs and 100 per cent of the net profit constitute direct contribution to local households. The indirect contribution is 17.43 per cent which is from the cost of sales. The indirect contribution is higher because the fish is locally sourced.

Table 5. 29: Direct and Indirect Contribution

| | Total (BD Tk.) | Direct % | Indirect % | Direct (BD Tk.) | Indirect (BD Tk.) |
|---------------|-------------------|----------|------------|--------------------|----------------------|
| Cost of sales | 4,371,023 | 0 | 17.43 | 0 | 761,710 |
| Staff Costs | 482,000 | 100 | 0 | 482,000 | 0 |
| Utilities | 214,500 | 0 | 0 | 0 | 0 |
| Misc. | 214,975 | 0 | 0 | 0 | 0 |
| VAT | 686,266 | 0 | 0 | 0 | 0 |
| Corp.Tax | -70,066 | 0 | 0 | 0 | 0 |
| Net profit | -210,198 | 100 | 0 | -210,198 | 0 |
| Total | 5,688,500 | 4.8% | 13.4% | 271,802 | 761,710 |

Source Fieldwork, August 2017

5.8.4 Linkages and Leakages

Analysis of the linkages and leakages data (table 5.30) indicates that the cost of sales has the highest level of linkages because all fish are locally sourced and there are low-cost levels. Rental of commercial premises is estimated as 50 per cent leakages. The highest levels of leakages are associated with electricity and loan repayments because the payments are made to institutions outside Cox's Bazar. The overall rate of linkages is 79.9 per cent and total rate of leakages is 4.5 per cent. The high level of linkage has a positive contribution of 2 per cent to poor households in Cox's Bazar.

Table 5. 30: Linkages and Leakages

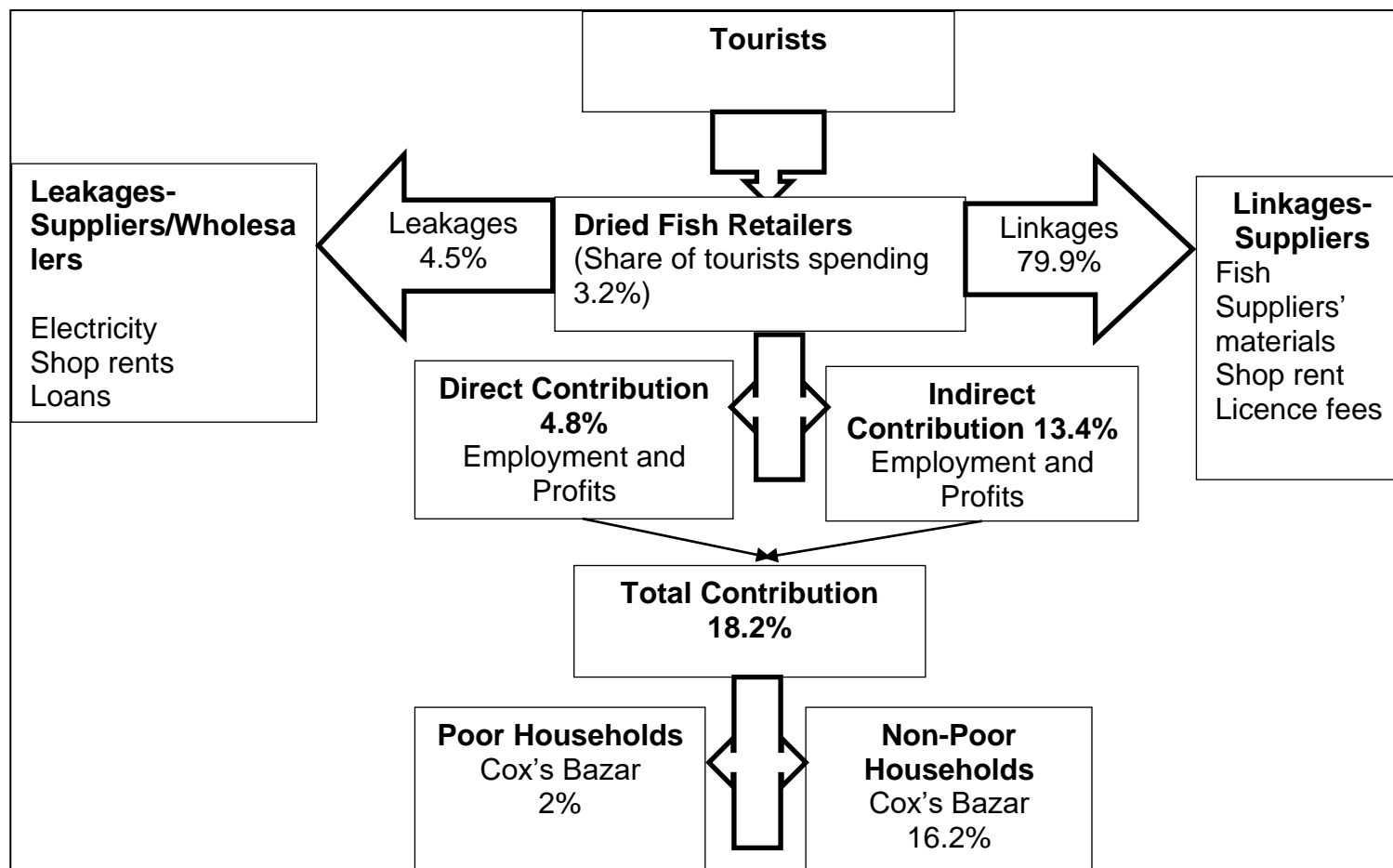
| | Costs (BD Tk.) | Revenue (%) | Linkage (%) | Leakage (%) | Import Leakage (%) | Total Leakage (%) |
|---------------|-------------------|----------------|----------------|----------------|--------------------------|-------------------------|
| Cost of sales | 4,371,023 | 76.8 | 100 | 0.0 | 0.0 | 0.0 |
| Shop rent | 137,000 | 2.4 | 50 | 50 | 0.0 | 50 |
| License Fees | 2,350 | 0.0 | 100 | 0.0 | 0.0 | 0.0 |
| Electricity | 77,500 | 1.4 | 0.0 | 100 | 0.0 | 100 |
| Loan | 7,625 | 0.1 | 0.0 | 100 | 0.0 | 100 |
| Misc. | 205,000 | 3.6 | 50 | 50 | 0.0 | 50 |
| Total/Avg. | 4,800,498 | 84.4 | 79.9% | 4.5% | 0% | 4.5% |

Source: Fieldwork, August 2017

5.8.5 Tourism Value Chain Mapping Framework

Figure 5.6 illustrates the supply chain and key actors in the dried fish retail component of the tourism value chain. The fresh fish seller supplies the fish to the whole seller, vendors and retailers. Restaurants, hotels and street vendors buy dried fish from the wholesaler or vendors. The mapping framework traces the tourist expenditure on dried fish retailers and the direct and indirect contribution to households and levels of linkages and leakages. Overall, there is a very small proportion of leakages (4.5 per cent) because all the fish are locally sourced. The high level of linkage (79.9 per cent) can be explained by the fact that fish production process is conducted locally in Cox's Bazar and there is limited expenditure on items such as salt, bamboo, and car hire. The total contribution to local households' income is 18.2 percent of which 2 per cent reaches poor households.

Figure 5. 6: Tourism Value Chain Framework: Dried Fish Retailers



Source: Author's Own Work 2019

5.9 Tourism Value Chain: Handicrafts Retailers

This section examines the handicrafts retailers' tourism value chain in Cox's Bazar based on the research sample of 25 sellers. The key characteristics of the businesses are outlined, and monthly income and expenditure statements are scrutinized. The sources of the raw materials for handicrafts are examined. The direct and indirect contributions of the handicraft sector to households are calculated and finally, leakage and linkages are presented in the context of a tourism value chain mapping framework for the handicrafts sector. The product range offered by handicraft sellers is mainly composed of hats, bags, sandals, children's toys, samuk necklaces, seashell jewellery, metal products, chutney, Burmese chutney, candies and soap. Products manufactured from seashells are in high demand and include patila, sada kata, raj mukut, probal, kori, jinuk, and sonko. Most of these products are imported and are sought after as souvenirs.

5.9.1 Business Characteristics

Table 5.31 illustrates that the handicraft retailers have an average of two staff members per shop, with a total of 25 shops in the sample. The results also indicate that 100 per cent of staff are male and reflects the literature (Islam 2012) regarding the gender gap in labour market participation in Bangladesh. The average monthly income per shop is BD Tk. 119,784 and the net profit margin is 12.6 per cent.

Table 5. 31: Business Characteristics: Handicraft Retailers

| Details | Number | Number % |
|--|---------|----------|
| Number of questionnaires | 25 | |
| Average number of staff per shop | 2 | |
| Male staff as % of all staff | 42 | 100.0 |
| Female staff as % all staff | - | 0.0 |
| Average revenue per shop, month (BD Tk.) | 119,784 | |

Source: Fieldwork, August 2017

5.9.2 Monthly Expenditure

A total revenue of BD Tk. 2,994,600 is shown in table 5.32. The results indicate that this is the third highest revenue generating sector after hotels and the dried fish sectors. The cost of sales is 70.2 per cent and it is high because the majority of the seashell products are imported from neighboring countries such as China, Burma, and Thailand. The other costs such as electricity, license fees, and staff costs are moderately low, but result in a higher level of contribution to the local households. The results show that the monthly net profit margin is BD Tk. 377,157 and the average monthly net profit is BD Tk. 15,086 per shop.

Table 5. 32: Monthly Income and Expenditure Statement

| | Total (BD Tk.) | Average (BD Tk.) | Share (%) |
|----------------------|-------------------|---------------------|--------------|
| Revenue | 2,994,600 | 119,784 | 100.0 |
| Costs | | | |
| Cost of sales | 2,102,053 | 84,082 | 70.2 |
| Staff Costs | 137,000 | 5,480 | 4.6 |
| Shop rent | 39,603 | 1,584 | 1.3 |
| License Fees | 9,083 | 363 | 0.3 |
| Electricity | 75,640 | 3,026 | 2.5 |
| Misc. | 31,000 | 1,240 | 1.0 |
| Total Costs | 2,394,380 | 95,775 | 80.0 |
| Net Operating Income | 600,220 | 24,009 | 20.0 |
| VAT | 97,344 | 3,894 | 3.3 |
| Corporation tax | 125,719 | 5,029 | 4.2 |
| Net profit | 377,157 | 15,086 | 12.6% |

Source: Fieldwork, August 2017

The table above 4.32 illustrates that the profit margin is 12.6 per cent and the business profits varies from season to season. The respondents stated that the business generates more profits in peak season. The other reason for low profits is because of the low retail prices in a competitive market.

5.9.3 Direct and Indirect Contribution

Solaiman et al. (2006) states that around 1000 households are directly and indirectly involved in the handicrafts sector in Cox's Bazar. In terms of direct

and indirect contribution table 5.33 demonstrates the former is 17.2 per cent. The direct contribution is associated with staff salaries, wages and the profits from the business owner. It can be assumed that the profit does not contribute to the poor households because the owners are not poor in most cases. The indirect contribution is zero because most of the seashell-based items are imported from the other countries and there is a weak supply chain within the Cox's Bazar region. Cox's Bazar Jhinuk market is the centre for wholesale business relating to seashell ornaments and jewellery according to a study by Solaiman et al. (2006).

Table 5. 33: Direct and Indirect Contribution

| | BD Tk. | Direct % | Indirect % | Direct (BD Tk.) | Indirect (BD Tk.) |
|---------------|-----------|-------------|---------------|--------------------|----------------------|
| Cost of sales | 2,102,053 | 0 | 0 | 0 | 0 |
| Staff Costs | 137,000 | 100 | 0 | 137,000 | 0 |
| Utilities | 115,243 | 0 | 0 | 0 | 0 |
| Misc. | 40,083 | 0 | 0 | 0 | 0 |
| VAT | 97,344 | 0 | 0 | 0 | 0 |
| Corp.Tax | 125,719 | 0 | 0 | 0 | 0 |
| Net profit | 377,157 | 100 | 0 | 377,157 | 0 |
| Total | 2,994,600 | 17.2 | 0.0 | 514,157 | 0 |

Source: Fieldwork, August 2017

This research found that the majority of handicraft sellers in Cox's Bazar source the supplies related to seashells products from other parts of the country and from outside of Bangladesh. Finally, these raw materials are processed in Cox's Bazar to make ornaments and jewellery. This indicates that the main supply chain is not in Cox's Bazar and consequently the handicrafts retail sector has a negligible contribution on local livelihoods.

5.9.4 Sourcing Handicrafts Products

The handicraft retailers have a high level of imports based on customer demand for products of a quality specification which is not available in Bangladesh. In order to meet the tourists' demands, the stock is imported primarily from China,

Burma, Thailand, and India. However, there are local supplies of seashells from Teknaf, St. Martins Island, Shahporir Dip, Choufaldandi, Moheshkhali, Kutubdia, Ramu, and other coastal areas. The results indicate that high levels of leakages occur due to the dependence on imported products.

Table 5. 34: Sourcing by Country

| Sourcing | Total (%) |
|-------------|-----------|
| China | 78.1 |
| Burma | 11.0 |
| Bangladesh | 8.6 |
| Thailand | 2.3 |
| Cox's Bazar | 0.0 |
| Total | 100.0 |

Source: Fieldwork, August 2017

5.9.5 Linkages and Leakages

Table 5.35 analyses the total linkages and leakages relating to the handicrafts retail sector.

Table 5. 35: Linkages and Leakages

| Cost Items | Costs (BD Tk.) | Revenue (%) | Linkages (%) | Leakage BD (%) | Imports (%) | Total leakage (%) |
|---------------|-------------------|----------------|-----------------|-------------------|----------------|-------------------------|
| Cost of sales | 2,102,053 | 70.2 | 0.0 | 25.9 | 74.1 | 100.0 |
| Shop rent | 39,603 | 1.3 | 50.0 | 50.0 | 0.0 | 50.0 |
| License | 9,083 | 0.3 | 100.0 | 0.0 | 0.0 | 0.0 |
| Electricity | 75,640 | 2.5 | 0.0 | 100.0 | 0.0 | 100.0 |
| Other Costs | 31,000 | 1.0 | 50.0 | 50.0 | 0.0 | 50.0 |
| Total/Avg. | 2,257,380 | 75.4% | 1.5% | 21.9% | 52.0% | 73.9% |

Source: Fieldwork, August 2017

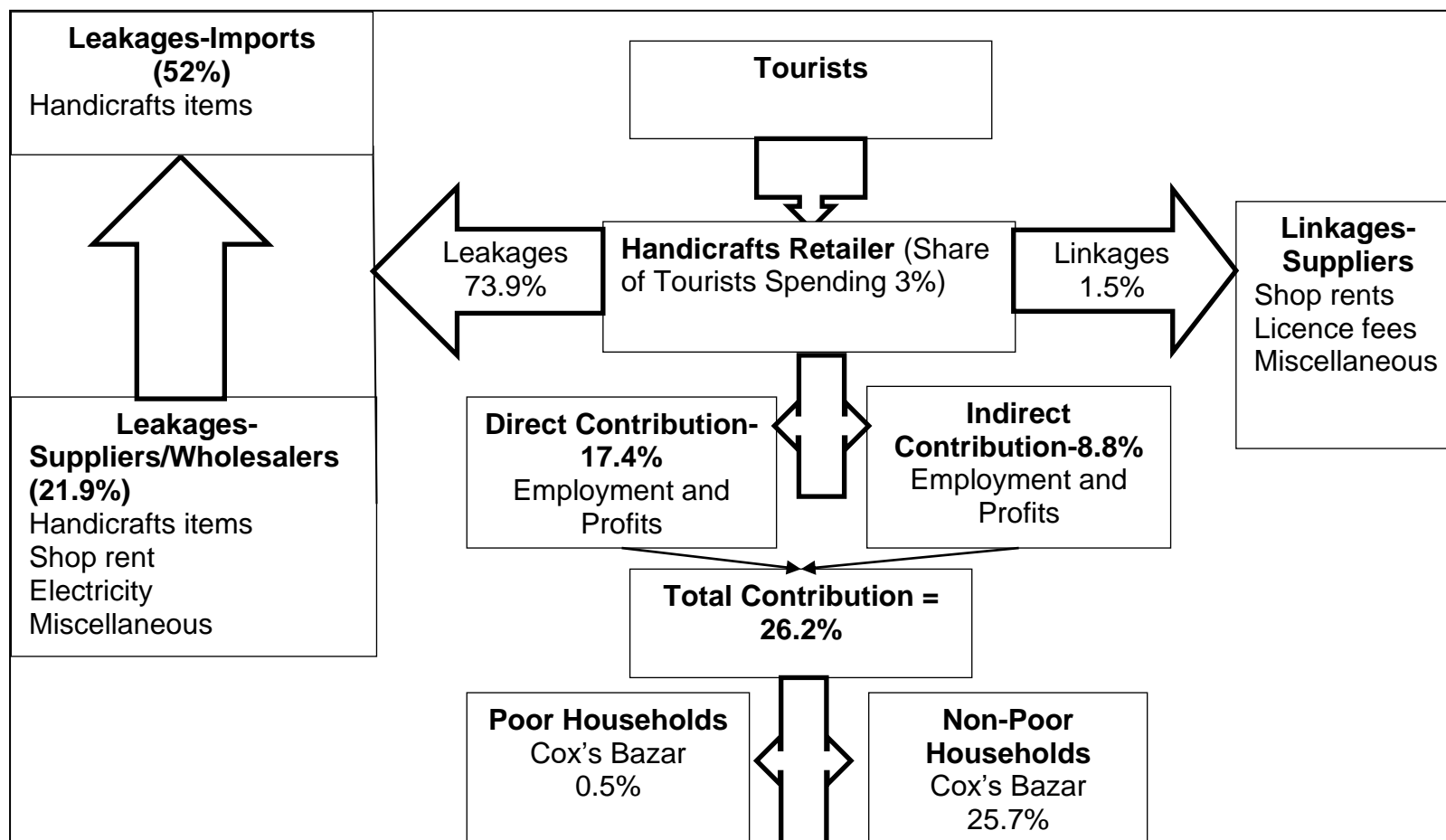
The local linkages are associated with shop rent, license fees and other costs.

The overall results show that total local linkages rate is only 1.5 per cent and the total leakages rate is 73.9 per cent in products relating to imports and products sourced from other parts of Bangladesh.

5.9.6 Tourism Value Chain Mapping Framework

Figure 5.7 presents a value chain mapping framework for handicrafts retailers. The framework shows that the majority of the revenue does not remain in Cox's Bazar. The total rate of leakages is 73.9 per cent. The majority of leakages (52 per cent) relates to imports from China, Burma, and Thailand. The largest sources of leakages are related to seashell-imported products clothes, sandals, soap, and beauty products. It is relatively inexpensive to import products from Burma, as it is close to Cox's Bazar. The linkages rate is low at only 1.5 per cent and the linkages are related to local suppliers, cooperative markets and products such as seashells kori, jinuk, wood items and bangles. The retail prices are comparatively low, but it has a positive contribution on the Cox's Bazar local economy. The framework shows that the total contribution to local households is 26.2 per cent which comprises a direct contribution of 17.4 per cent via staff wages and owners' profits and an indirect contribution of 8.8 per cent. There is very little contribution from the handicrafts retail sector to the poor households' incomes in Cox's Bazar (0.5 per cent) and a high level of contribution to non-poor households at 25.7 per cent.

Figure 5. 7: Tourism Value Chain Framework: Handicrafts Retailers



Source Author's Own Work 2019

5.10 Tourism Value Chain: Handicrafts Street Vendors

It is estimated (Rahman 2010) that there are approximately 500 people working in street handicrafts who earn their living making and selling ornaments and jewellery in the Cox's Bazar beaches area. These street vendors are classified as self-employed or small entrepreneurs and operate in the informal economy (Echtner 1995). This section firstly outlines the street vendors' demographic profile and areas of residence. There is an analysis of data relating to monthly income and expenditure statements. The direct and indirect contribution to households is calculated and linkages and leakages are presented within a mapping framework within the tourism value chain.

5.10.1 Business Characteristics

The street vendors segment of the tourism value chain is divided into two categories namely street vendors-food and street vendors-handicrafts. A total of 27 structured questionnaires were administered and nine vendors in the street food category and 18 vendors handicrafts category responded. Table 5.36 shows that 77 per cent of workers in the handicrafts street vendor's sector are male.

Table 5. 36: Business Characteristics: Handicrafts Street Vendors

| Gender | Number | Number % |
|-----------------------------|--------|----------|
| Male | 14 | 77.8 |
| Female | 4 | 22.2 |
| Informal | 17 | 94.4 |
| Formal | 1 | 5.6 |
| No. of Tourists (Daily) | 23.81 | 23.81 |
| % of sales to local economy | 100 | 100.0 |
| % of foreign customers | 0 | 0.0 |
| Total | 18 | 100.0 |

Source: Fieldwork, August 2017

The majority (94.4 per cent) of the street vendors work in the informal economy and face many challenges as the local beach committee and the local police

authority officially do not allow the vendors to trade in the beaches area. The handicrafts street vendors sell their products to an average of 23.81 customers per day and the data shows that all customers are domestic tourists.

5.10.2 Handicrafts Street Vendors' Residences

Table 5.37 illustrates that 12 of the 18 handicrafts street vendors in the research sample live in Sigal Para area, which is an area very close to the Suganda, Laboni, and Kolatoli beaches. The respondents live there temporarily, and it is easy to come to the beach any time to conduct their business with tourists. The business hours are from 9 am to midnight because the majority of the tourists visit the beaches in early morning to midday and evening to midnight due to hot weather conditions. Only two vendors live near Kolatoli Beach, and their village name is also Kolatoli.

Table 5. 37: Residence Street Vendors Handicrafts

| Location | Number | Number % |
|-------------|--------|----------|
| Sigal Para | 12 | 66.7 |
| Kolatoli | 2 | 11.1 |
| Light House | 1 | 5.6 |
| Moheskhal | 1 | 5.6 |
| TNT Para | 1 | 5.6 |
| Candanimati | 1 | 5.6 |
| Total | 18 | 100.0 |

Source: Fieldwork, August 2017

5.10.3 Monthly Expenditure

The monthly income and expenditure statement (table 5.38) shows that more than 57 percent is cost of sales items. The total costs are 81.9 per cent which relates to food cost, local police fees, and other miscellaneous costs. The cost of sales items are local seashell products such as pearls (mukta), kori, jinuk, and samuk. The vendors buy products from the local suppliers in kilograms and the cost is BD Tk. 600 per kilogram. The vendors can make 15 to 20 necklaces,

ornaments, or earrings and the selling price per item is approximately BD Tk. 20 to 30. The vendors may have 20 to 30 tourist customers per day and the total net profit is BD Tk. 71,452 and the average income per vendor is BD Tk. 3,970.

Table 5. 38: Monthly Income and Expenditure Statement

| | Total (BD Tk.) | Average (BD Tk.) | Share (%) |
|----------------------|-------------------|---------------------|--------------|
| Revenue | 394,320 | 21,907 | 100.0 |
| Costs | | | |
| Cost of sales | 227,155 | 12,620 | 57.6 |
| Food cost | 46,810 | 2,601 | 11.9 |
| Local police fees | 45,570 | 2,532 | 11.6 |
| Other | 3,333 | 185 | 0.8 |
| Total costs | 322,868 | 17,937 | 81.9 |
| Net Operating Income | 71,452 | 3,970 | 18.1 |
| VAT | - | - | 0.0 |
| Corporation tax | - | - | 0.0 |
| Net profit | 71,452 | 3,970 | 18.1% |

Source: Fieldwork, August 2017

5.10.4 Direct and Indirect Contribution

The indirect contribution is 55 per cent which occurs from cost of sales items as shown in table 5.39. There is no direct contribution from the staff wages because all handicrafts street vendors are self-employed. The direct contribution is allocated 100 per cent because all vendors are self-employed, and the profits make a direct contribution to local households. The total direct contribution is 18.1 per cent and the total indirect contribution is 43.9 per cent which contributes to local households.

Table 5. 39: Direct and Indirect Contribution

| | BD Tk. | Direct % | Indirect % | Direct (BD Tk.) | Indirect (BD Tk.) |
|------------------------|---------|-------------|---------------|--------------------|----------------------|
| Cost of sales | 227,155 | 0 | 55 | 0 | 125,277 |
| Premises and Utilities | 333 | 0 | 0 | 0 | 0 |
| Miscellaneous | 95,380 | 0 | 50 | 0 | 47,690 |
| VAT | 0 | 9 | 0 | 0 | 0 |
| Income tax | 0 | 0 | 0 | 0 | 0 |
| Net profit | 71,452 | 100 | 0 | 71,452 | 0 |
| Total Contribution | 394,320 | 18.1 | 43.9 | 71,452 | 172,967 |

Source: Fieldwork, August 2017

5.10.5 Linkages and Leakages

The total rate of linkages is 36.5 per cent (table 5.40) and the level of total leakages is 45.4 per cent which includes 16.3 per cent of imports leakages. The cost of sales linkages is estimated based on the respondents' information and the seashell products' cost. Very often small seashell products are locally supplied such as kori, necklace, smauk, jinuk, and all these products are sourced from Cox's Bazar and other coastal areas (Solaiman 2006).

Table 5. 40: Linkages and Leakages

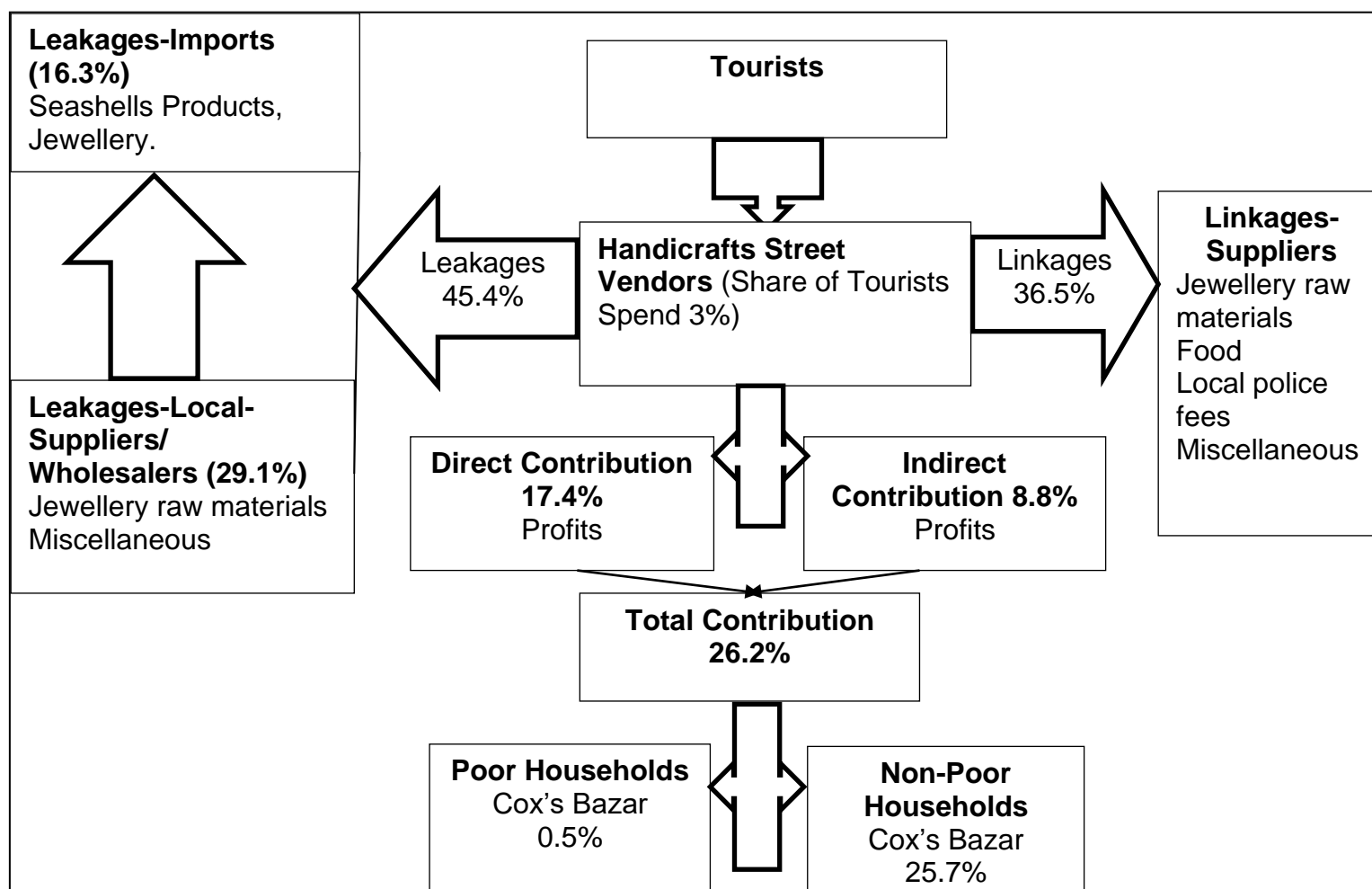
| Cost items | Costs (BD Tk.) | Revenue (%) | Linkage (%) | Leakage (%) | Import Leakage (%) | Total Leakage (%) |
|---------------|-------------------|----------------|----------------|----------------|--------------------------|-------------------------|
| Cost of sales | 227,155 | 57.6 | 21.9 | 49.8 | 28.3 | 78.1 |
| Food cost | 46,810 | 11.9 | 100.0 | 0.0 | 0.0 | 0.0 |
| Police fees | 45,570 | 11.6 | 100.0 | 0.0 | 0.0 | 0.0 |
| Other | 3,333 | 0.8 | 50.0 | 50.0 | 0.0 | 50.0 |
| Total/Avg. | 322,868 | 81.9 | 36.5% | 29.1% | 16.3% | 45.4% |

Source: Fieldwork, August 2017

5.10.6 Tourism Value Chain Mapping Framework

Figure 5.8 illustrates that the 18 street vendors receive a total of BD Tk. 394,320 and the direct contribution is 17.4 based on profits and the indirect contribution is 8.8 per cent related to linkages with local suppliers. The leakages apply only for the large seashells such as probal, raj mukut, sonko, and the percentages are 29.1 per cent relating to supplies from Bangladesh and 16.3 per cent for imported products. The rate of linkages is 36.5 per cent because the local suppliers are directly engaged with the handicraft street vendors. The total contribution to poor households' income is 0.5 per cent and the non-poor household contribution is 25.7 per cent.

Figure 5. 8: Tourism Value Chain Framework: Handicrafts Street Vendors



Source Author's Own Work 2019

5.11 Tourism Value Chain: Tuk Tuk Drivers

Tuk tuks or auto rickshaws are three wheeled forms of transport and are ubiquitous in Bangladesh. In Cox's Bazar tuk tuks takes tourists for sightseeing or pick-up and drop-off service from destination to destination. Tuk tuk driving is a self-employed business which is run by only one person. The tuk tuk fare varies and it depends on the condition of hiring the tuk tuk. According to the BBS (2011) there are 2,700 registered and 1,200 non-registered tuk tuk vehicles operating in Cox's Bazar. A sample of 20 tuk tuk drivers was selected for the purpose of this thesis. In this section the tuk tuk drivers' business characteristics are described and there is an analysis of monthly income statements. There is also an analysis of direct and indirect contribution to local households. Rates of linkages and leakages in this sector are outlined and a tourism value chain mapping framework relating to this actor is presented.

5.11.1 Business Characteristics

The research sample comprised 20 tuk tuk drivers. Analysis of questionnaire responses demonstrates that 40 per cent of drivers owned their vehicles and 60 per cent were rented. There are no female drivers in the sample. The average daily passenger rides are 12 and the average price for per trip is BD Tk. 20 to BD Tk. 100. The average monthly income is BD Tk. 32,263.

Table 5. 41: Business Characteristics: Tuk Tuk Drivers

| Description | Number | Number % |
|-------------------------------------|--------|----------|
| Number of questionnaires | 20 | |
| Tuk Tuk owned | 8 | 40 |
| Tuk Tuk rented | 12 | 60 |
| Male staff as % of all staff | 20 | 100 |
| Female staff as % all staff | 0 | 0 |
| No. of passengers (Daily average) | 12 | 100 |
| Average revenue per month (BD. Tk.) | 32,263 | |

Source: Fieldwork, August 2017

5.11.2 Monthly Income and Expenditure Statement

Table 5.42 shows that the total revenue generated is BD Tk. 645,259. The bulk of cost of sales (28.8 per cent) are associated with tuk tuk rentals on a daily basis. The batteries cost is 19.8% on a monthly basis and equates to approximately BD Tk. 210 on a daily basis. Another major cost is food which is 14.9 per cent because the tuk tuk drivers are self-employed and they consume food on duty during a 10 to 12 hours shift. The licenses fee is applied for by the tuk tuk owners, and the result indicates that the licenses fee is 4.6 per cent of cost of sales. The tuk tuk owner pays this licensees fee to Cox's Bazar municipality office on a yearly basis. The total cost is nearly 70 per cent and the net profit margin is 30.4 per cent. However, margins may increase during peak season.

Table 5. 42: Monthly Income and Expenditure Statement

| | Total (BD Tk.) | Average (BD Tk.) | Share (%) |
|----------------------|----------------|------------------|-----------|
| Revenue | 645,259 | 32,263 | 100.0 |
| Costs | | | |
| Rent/Fees | 186,000 | 9,300 | 28.8 |
| Batteries | 127,720 | 6,386 | 19.8 |
| Licences Fees | 29,760 | 1,488 | 4.6 |
| Vehicle maintenance | 1,240 | 62 | 0.2 |
| Food Cost | 96,100 | 4,805 | 14.9 |
| Miscellaneous | 7,750 | 388 | 1.2 |
| Total Cost | 448,570 | 22,429 | 69.5 |
| Net Operating Income | 196,689 | 9,834 | 30.5 |
| Corporation tax | 488 | 24 | 0.1 |
| Net profit | 196,201 | 9,810 | 30.4 |

Source: Fieldwork, August 2017

5.11.3 Direct and Indirect Contributions

Table 5.43 illustrates tuk tuk drivers' direct and indirect contribution to local households. The rate of direct contribution of 30.4 per cent derives from the tuk tuk drivers' net profit margin, which is BD Tk. 196,201. The indirect contribution is 39.6 per cent and is derived from the cost of sales, mainly in food (50 per

cent) and miscellaneous items (80 per cent). The tuk tuk drivers consume food during their duties and indirectly contribute to the local households' incomes and miscellaneous items includes emergency maintenance and unexpected costs.

Table 5. 43: Direct and Indirect Contribution

| | BD Tk. | Direct % | Indirect % | Direct (BD Tk.) | Indirect (BD Tk.) |
|---------------|---------|-------------|---------------|--------------------|----------------------|
| Cost of sales | 344,720 | 0 | 50 | 0 | 172,360 |
| Utilities | 0 | 0 | 0 | 0 | 0 |
| Misc. | 103,850 | 0 | 80 | 0 | 83,080 |
| VAT | 0 | 0 | 0 | 0 | 0 |
| Income tax | 488 | 0 | 0 | 0 | 0 |
| Net profit | 196,201 | 100 | 0 | 196,201 | 0 |
| Total | 645,259 | 30.4 | 39.6 | 196,201 | 255,440 |

Source: Fieldwork, August 2017

5.11.4 Linkages and Leakages

Table 5.44 shows the rate of linkages and leakages in relation to the local economy. The total level of linkages is 59 per cent and the majority of local linkages are associated with rent, license fees, vehicle maintenance and local food costs. The total leakage (from Cox's Bazar) is only 10.5 per cent, which is associated with batteries (50 per cent) sourced from other regions in Bangladesh.

Table 5. 44: Linkages and Leakages

| Cost items | Costs | % of Revenue | Linkages (%) | Leakages (%) | Import Leakage (%) | Total Leakage (%) |
|-------------|---------|-----------------|-----------------|-----------------|--------------------------|-------------------------|
| Rent/Fees | 186,000 | 28.8 | 100 | 0.0 | 0.0 | 0.0 |
| Batteries | 127,720 | 19.8 | 50 | 50 | 0.0 | 50 |
| Licences | 29,760 | 4.6 | 100 | 0.0 | 0.0 | 0.0 |
| Maintenance | 1,240 | 0.2 | 100 | 0.0 | 0.0 | 0.0 |
| Food Cost | 96,100 | 14.9 | 100 | 0.0 | 0.0 | 0.0 |
| Misc. | 7,750 | 1.2 | 50 | 50 | 0.0 | 50.0 |
| Total/Avg. | 448,570 | 69.5 | 59.0% | 10.5% | 0.0% | 10.5% |

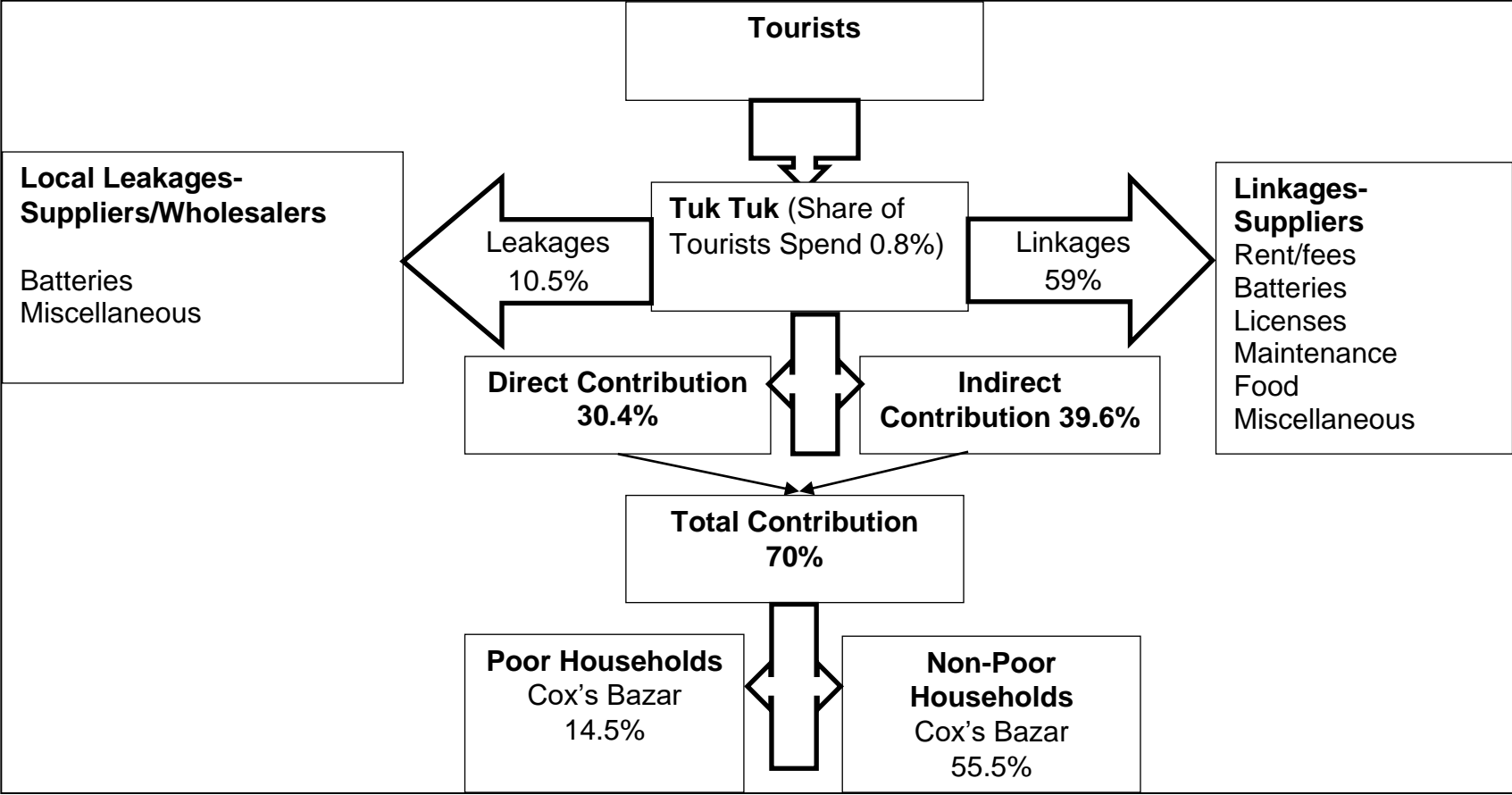
Source: Fieldwork, August 2017

The miscellaneous leakage is 50 per cent, which occurs because of importing tyres, chains, and other vehicle maintenance items. Tourists spend only 0.8 per cent on tuk tuk hire but the local linkages make a significant contribution to the local economy and local households.

5.11.5 Tourism Value Chain Mapping Framework

Figure 5.11 illustrates that the tourists' 0.8 per cent share of expenditure on tuk tuks has a direct contribution of 30.4 per cent based on profits and the indirect contribution is 39.6 per cent. The indirect contribution is higher because the majority of expenditure by tuk tuk drivers is associated with locals' supplies. The rate of linkages is 59 per cent and the total leakages rate from Cox's Bazar is 10.5 per cent. The total contribution is 70 per cent which contributes 14.5 per cent to poor households' incomes.

Figure 5. 9: Tourism Value Chain Framework: Tuk Tuk Drivers



Source: Author's Own Work 2019

5.12 Tourism Value Chain: Rickshaw Pullers

The rickshaw is a popular form of daily transport for all classes of people throughout Bangladesh. Cox's Bazar is no exception and the rickshaw is highly popular among local people, tourists and for the couriering of goods by local businesses. Rickshaws are more economical than taxis or tuk tuks. According to latest available statistics (BBS 2011) there are 1,960 registered and 800 non-registered rickshaw vehicles operating in Cox's Bazar. This section firstly describes business characteristics of the rickshaw pullers. There is an examination of monthly income and expenditure statements. An analysis of the rickshaw pullers direct and indirect contribution to local households is presented. The rate of linkages and leakages is analysed and this section concludes with the development of a tourism value chain mapping framework relating to rickshaw pullers.

5.12.1 Business Characteristics

Rickshaw drivers are mainly self-employed with no employees. The research sample consisted of a total of 15 rickshaw pullers. A profile of this segment of the tourism value chain, based on responses to the questionnaires is illustrated in table 5.45. The majority (67 per cent) of rickshaws are rented and the reason for the high level of rentals is because the rickshaw business tends to be seasonal and the rickshaw pullers are involved in other employment at different times of the year, such as daily labour in order to increase their incomes. There are no female rickshaw pullers. Rickshaw pullers have three main sources of income which relate to passenger fares, payments for courier services and commission from hotels for directing tourists to the hotel. The average monthly income from these three sources is BD Tk. 15,257.

Table 5. 45: Business Characteristics: Rickshaw Pullers

| Description | Number | Number % |
|------------------------------------|--------|----------|
| Number of questionnaires | 15 | |
| Rickshaw is owned | 5 | 33 |
| Rickshaw is rented | 10 | 67 |
| Male staff as % of all staff | 15 | 100 |
| Female staff as % all staff | 0 | 0 |
| No. of Tourists (Daily average) | 21 | 100 |
| Average revenue per month (BD Tk.) | 15,257 | |

Source: Fieldwork, August 2017

5.12.2 Monthly Income and Expenditure Statement

Table 5.46 illustrates that the income from passenger fares is 95.5 per cent, delivery of goods generates 3.8 per cent and hotel commissions produce 0.7 per cent.

Table 5. 46: Monthly Income and Expenditure Statement

| | Total (BD Tk.) | Average (BD Tk.) | Share (%) |
|-------------------------|----------------|------------------|-----------|
| Revenue | | | |
| Income from trip | 218,550 | 14,570 | 95.5 |
| Deliveries | 8,730 | 582 | 3.8 |
| Hotel room sales & tips | 1,580 | 105 | 0.7 |
| Total Revenue | 228,860 | 15,257 | 100.0 |
| Costs | | | |
| Rental Fees | 43,090 | 2,873 | 18.8 |
| Food Cost | 54,560 | 3,637 | 23.8 |
| Vehicle maintenance | 5,588 | 373 | 2.4 |
| Licence | 1,533 | 102 | 0.7 |
| Misc. | 14,538 | 969 | 6.4 |
| Total Cost | 119,309 | 7,954 | 52.1 |
| Net Operating Income | 109,551 | 7,303 | 47.9 |
| Income tax | - | | 0.0 |
| Net profit (BD Tk.) | 109,551 | 7,303 | 47.9 |

Source: Fieldwork, August 2017

The majority of their costs are related to food costs, which is 23.8 per cent, as the rickshaw pullers work 10 to 12 hours a day and spend money on buying lunch and dinner. The rental fees are 18.8 per cent, which goes to the local rickshaw owners. The miscellaneous cost is 6.4 percent, which is related to maintenance. The average net profit margin is 47.9 per cent, which equates to BD Tk. 7,303 per head.

5.12.3 Direct and Indirect Contribution

Tourists spend 0.6 per cent of their budget on rickshaw transport services. Table 5.47 illustrates that the direct contribution to local households is 47.9 per cent which is derived from net profits. The indirect contribution of 32.6 per cent is based on the cost of sales and miscellaneous items. Analysis of the data indicates that rickshaw pullers have the highest level of gross contribution (80.5 per cent) to local households in Cox's Bazar from the 12 business actors in the research sample.

Table 5. 47: Direct and Indirect Contribution

| | BD (Tk.) | Direct (%) | Indirect (%) | Direct (BD Tk.) | Indirect (BD Tk.) |
|---------------|----------|------------|--------------|-----------------|-------------------|
| Cost of sales | 50,211 | 0 | 80 | 0 | 40,169 |
| Utilities | 0 | 0 | 0 | 0 | 0 |
| Misc. | 69,098 | 0 | 50 | 0 | 34,549 |
| VAT | 0 | 0 | 0 | 0 | 0 |
| Income tax | 0 | 0 | 0 | 0 | 0 |
| Net profit | 109,551 | 100 | 0 | 109,551 | 0 |
| Total | 228,860 | 47.9 | 32.6 | 109,551 | 74,718 |

Source: Fieldwork, August 2017

5.12.4 Linkages and Leakages

Table 5.48 demonstrates that the rate of local linkages for rickshaws pullers is relatively high at 49 per cent. The rate of leakages is 3.2 per cent although there are no leakages related to imported goods. Although tourists spend a relatively small share on rickshaws, it has a high level of linkages to the local economy. The majority linkage items are related to rental fees where 100 per cent goes to the local rickshaw rental authority, expenditure on food is locally sourced and license fees are payable to the local Cox's Bazar municipality authority. The leakage rate relates to the sourcing of spare parts, tyres, rickshaw seats, and chains from other regions in Bangladesh.

Table 5. 48: Linkages and Leakages

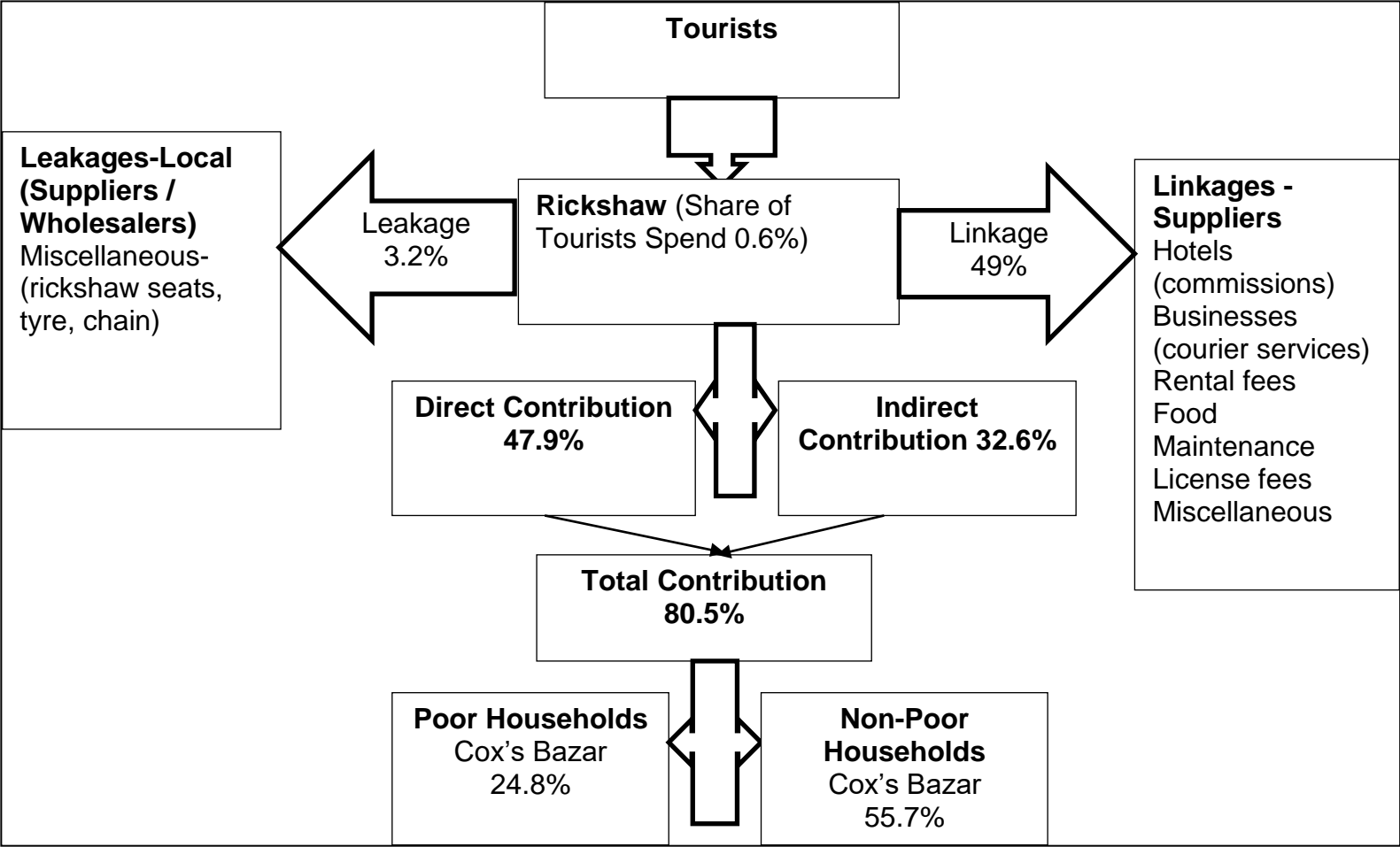
| Cost items | Costs | % of Rev- enue | Linkage | Leakages (BD) | Leakage Imports | Total leakage |
|-------------|---------|----------------------|---------|------------------|--------------------|------------------|
| Rental Fees | 43,090 | 18.8 | 100 | 0.0 | 0.0 | 0.0 |
| Food Cost | 54,560 | 23.8 | 100 | 0.0 | 0.0 | 0.0 |
| Maintenance | 5,588 | 2.4 | 100 | 0.0 | 0.0 | 0.0 |
| Licences | 1,533 | 0.7 | 100 | 0.0 | 0.0 | 0.0 |
| Misc. | 14,538 | 6.4 | 50 | 50 | 0.0 | 50 |
| Total/Avg. | 119,309 | 52.1 | 49% | 3.2% | 0.0% | 3.2% |

Source: Fieldwork, August 2017

5.12.5 Tourism Value Chain Mapping Framework

The mapping framework illustrates the high level of linkages to the local economy for rickshaw pullers and the low level of leakages. The combined level of direct and indirect contributions to households is also high at 80.5 per cent. It can be noted that although this segment of the tourism value chain accounts for a small share of tourists' spending, its contribution to poor households' income is significant due to the self-employed nature of the business.

Figure 5. 10: Tourism Value Chain Framework: Rickshaw Pullers



Source: Author's Own Work 2019

5.13 Tourism Value Chain: Tours and Beach Activities

For the purposes of this research, beach umbrella rentals, jeep tours and beach photographers are combined into one sector entitled Tours and Beach Activities. This is because the total share of tourists' expenditure in this category is low (1.9 per cent) and the total sample size was only 13. Business characteristics, monthly income and expenditure statements, direct and indirect contributions and leakages and linkages are analysed for each of the three actors in this sector. Finally, a mapping framework is presented incorporating leakages and linkages and contribution to poor households for the Tours and Beach Activities sector as a whole.

5.13.1 Business Characteristics

The beach umbrella business is part of the formal economy and is subject to licensing regulations. The average daily number of rentals is 111 per owner. The hourly price for renting a beach umbrella is BD Tk. 29 and rental is normally conducted on an hourly payment basis. The owners' average monthly income is BD Tk. 98,328. The majority of customers are domestic tourists. All respondents are self-employed and there were no female staff in the sample.

Table 5. 49: Business Characteristics: Beach Umbrella Rentals

| Descriptions | Number | Number % |
|--|--------|----------|
| Number of questionnaires | 4 | |
| Informal | 0 | 0 |
| Formal | 4 | 100 |
| Male staff as % of all staff | 4 | 100 |
| Female staff as % all staff | 0 | 0 |
| Tourists Type (Local) | | 100 |
| Tourists Type (Foreign) | | 0 |
| Umbrellas Rented (daily) | 111 | |
| Average revenue per unit, month (BD Tk.) | 98,328 | |

Source Fieldwork, August 2017

5.13.2 Monthly Statement

Table 5.50 illustrates the revenue, expenditure and income for beach umbrella rentals in the format of a monthly income and expenditure statement based on data from the questionnaires. The data shows that the total monthly income on beach umbrellas is BD Tk. 393,313 of which BD Tk. 27900 is allocated to staff costs. On average beach umbrella renters generated a net profit margin of approximately 59 per cent.

Table 5. 50: Monthly Income and Expenditure Statement

| | Total (BD Tk.) | Average (BD Tk.) | Share (%) |
|-----------------|----------------|------------------|-----------|
| Revenue | 393,313 | 98,328 | 100.0% |
| Costs | | | |
| Staff Cost | 27,900 | 6,975 | 7.1 |
| License Fees | 24,000 | 6,000 | 6.1 |
| Lease Holder | | | |
| Fees | 33,333 | 8,333 | 8.5 |
| Food Cost | 14,260 | 3,565 | 3.6 |
| Total Cost | 99,493 | 24,873 | 25.3 |
| Net Operating | | | |
| Income | 293,819 | 73,455 | 74.7 |
| VAT | 51,302 | 12,825 | 13.0 |
| Corporation tax | 10,459 | 2,615 | 2.7 |
| Net profit | 232,058 | 58,015 | 59.0 |

Source: Fieldwork, August 2017

5.13.3 Direct and Indirect Contributions

Table 5. 51: Direct and Indirect Contribution

| | BD Tk. | Direct % | Indirect % | Direct (BD Tk.) | Indirect (BD Tk.) |
|---------------|---------|----------|------------|-----------------|-------------------|
| Staff Cost | 27,900 | 100 | 0 | 27,900 | 0 |
| Cost of sales | 57,333 | 0 | 50 | 0 | 28,667 |
| Utilities | 0 | 0 | 0 | 0 | 0 |
| Misc. | 14,260 | 0 | 50 | 0 | 7,130 |
| VAT | 51,302 | 0 | 0 | 0 | 0 |
| Income tax | 10,459 | 0 | 0 | 0 | 0 |
| Net profit | 232,058 | 100 | 0 | 232,058 | 0 |
| Total | 393,313 | 66.1 | 9.1 | 259,958 | 35,797 |

Source: Fieldwork, August 2017

Table 5.51 above illustrates that the direct contribution is 66.1 per cent and the indirect contribution is 9.1 per cent. The high level of direct contribution is based on the staff salaries and the net profit margin.

5.13.4 Linkages and Leakages

Table 5.52 demonstrates that the total rate of linkages is 18.2 per cent and there are no leakages. The beach umbrella renters consume food totaling BD Tk. 14,260 from the local suppliers or street vendors, which generates local income and income for households. License and leaseholder fees are classified as linkages because they are payable locally.

Table 5. 52: Linkages and Leakages

| Cost items | Costs | % of Revenue | Linkage (%) | Leakage (%) | Import Leakage (%) | Total Leakage (%) |
|-------------------|--------|--------------|-------------|-------------|--------------------|-------------------|
| License Fees | 24,000 | 6.1 | 100 | 0.0 | 0.0 | 0.0 |
| Lease Holder Fees | 33,333 | 8.5 | 100 | 0.0 | 0.0 | 0.0 |
| Food Cost | 14,260 | 3.6 | 100 | 0.0 | 0.0 | 0.0 |
| Total/Avg. | 71,593 | 18.2 | 18.2% | 0.0% | 0.0% | 0.0% |

Source: Fieldwork, August 2017

5.14 Business Characteristics: Beach Photographers

It is estimated (Habiba 2017) there are 350 photographers in Cox's Bazar. Many of the photographers are self-employed and hire a camera from local camera shops on daily rental basis. All photographers are local residents of Cox's Bazar and all the beach photographers in the sample are male. On average 8 per cent of tourists use photographers' services on a daily basis and all customers are domestic tourists.

Table 5. 53: Business Characteristics: Beach Photographers

| Narrative | Number | Number % |
|-------------------------------------|--------|----------|
| Informal | 0 | 0 |
| Formal | 5 | 100 |
| Male staff as % of all staff | 5 | 100 |
| Female staff as % all staff | 0 | 0 |
| No. of Tourists (Daily) Average | 8 | |
| Tourists Type (Local) | | 100 |
| Tourists Type (Foreign) | | 0 |
| Average revenue per business, month | 12,710 | |

Source: Fieldwork, August 2017

5.14.1 Monthly Expenditure

Table 5.54 provides details of the beach photographers' monthly expenditure.

The results demonstrate that the total monthly revenue total is BD Tk. 63,550 and the average revenue is BD Tk. 12,710. The costs of sales include camera rental of 25.9 per cent. A majority of the photographers do not have their own camera and they rent the camera on a daily basis. Another major cost is food, which constitutes 15.6 per cent. Most of the photographers are on the beach from morning until evening and they buy their food from local street vendors and restaurants. The average net profit is BD Tk. 7,723, which equates to an average profit margin of 56.8 per cent.

Table 5. 54: Monthly Income and Expenditure Statement

| | Total (BD Tk.) | Average (BD Tk.) | Share (%) |
|----------------------|----------------|------------------|-----------|
| Revenue | 63,550 | 12,710 | 100.0 |
| Costs | | | |
| Camera Rental | 16,430 | 3,286 | 25.9 |
| License Fees | 1,083 | 217 | 1.7 |
| Food Cost | 9,920 | 1,984 | 15.6 |
| Total Cost | 27,433 | 5,487 | 43.2 |
| Net Operating Income | 36,117 | 7,223 | 56.8 |
| Corporation tax | - | - | 0.0 |
| Net profit | 36,117 | 7,223 | 56.8 |

Source: Fieldwork, August 2017

5.14.2 Direct and Indirect Contribution

Total direct contribution is 56.8 per cent and this is derived from the beach photographers' net profits. All beach photographers are self-employed, and this results in a positive contribution to local households. The total indirect contribution is 12.9 per cent, which is from the cost of sales. The cost of sales items are camera rental fees, license fees, and food costs.

Table 5. 55: Direct and Indirect Contribution

| | BD Tk. | Direct (%) | Indirect (%) | Direct (BD Tk.) | Indirect (BD Tk.) |
|-----------------|--------|------------|--------------|-----------------|-------------------|
| Cost of sales | 16,430 | 0 | 50 | 0 | 8,215 |
| Utilities | 0 | 0 | 0 | 0 | 0 |
| Misc. | 11,003 | 0 | 0 | 0 | 0 |
| VAT | 0 | 0 | 0 | 0 | 0 |
| Corporation tax | 0 | 0 | 0 | 0 | 0 |
| Net profit | 36,117 | 100 | 0 | 36,117 | 0 |
| Total | 63,550 | 56.8 | 12.9 | 36,117 | 8,215 |

Source: Fieldwork, August 2017

5.14.3 Linkages and Leakages

The total rate of linkages is 43.2 per cent and linkages are associated with areas of the local supply chain such as the camera rentals, license fees, and the food suppliers. There are no leakages because all spending by beach photographers remains in Cox's Bazar.

Table 5. 56: Linkages and Leakages

| | Costs (BD Tk.) | Share of Revenue (%) | Linkage (%) | Leakage (%) | Import Leakage (%) | Total Leakage (%) |
|-----------|----------------|----------------------|-------------|-------------|--------------------|-------------------|
| Rental | 16,430 | 25.9 | 100 | 0.0 | 0.0 | 0.0 |
| Licenses | 1,083 | 1.7 | 100 | 0.0 | 0.0 | 0.0 |
| Food Cost | 9,920 | 15.6 | 100 | 0.0 | 0.0 | 0.0 |
| Total/Avg | 27,433 | 43.2 | 43.2 | 0.0% | 0.0% | 0.0% |

Source: Fieldwork, August 2017

The pictures below were taken at Sugandha Beach and illustrate the competition among beach photographers for tourists' business.

Picture 5. 3: Beach Photographers Pictures



Picture1 and 2: Photographers are waiting for Tourists at entry point to Sugandha Beach.

Source: Fieldwork, August 2017

5.15 Tourism Value Chain: Jeep Tours

Table 5.57 outlines key data relating to Jeep Tours businesses in the sample.

Table 5. 57: Business Characteristics: Jeep Tours

| Narrative | Number | Number % |
|---------------------------------|--------|----------|
| Number of questionnaires | 4 | |
| Informal | 0 | 0 |
| Formal | 4 | 100 |
| Male staff as % of all staff | 4 | 100 |
| Female staff as % all staff | 0 | 0 |
| No. of Tourists (Daily) | 12 | 100 |
| Tourists Type (Domestic) | | 100 |
| Tourists Type (Foreign) | | 0 |
| Average revenue per unit, month | 36,425 | |

Source Fieldwork, August 2017

Jeep tour operators will hire a jeep on a daily basis from the owner for a fixed rate and the rent is approximately BD Tk. 600-800 daily. The results indicate that all jeep tour operators are male. The business is part of the Cox's Bazar formal economy, and the drivers need to meet the requirements of licensing authorities including driving fees. An individual jeep takes an average 12 passengers per trip and all passengers are domestic tourists.

5.15.1 Monthly Expenditure

Analysis of the data in the sample shows that the total monthly revenue is BD Tk.145,700. The single biggest cost relates to fuel, comprising an average 36.4 per cent. Jeep tour operators hire a jeep on a daily basis from the owner for a fixed rate and the rent is approximately BD Tk. 600-800 daily The average net profit is BD Tk. 14,958 which equates to an average profit margin of 41.1 per cent.

Table 5. 58: Monthly Income and Expenditure Statement

| | Total (BD Tk.) | Average (BD Tk.) | Share (%) |
|----------------------|----------------|------------------|-----------|
| Revenue | 145,700 | 36,425 | 100.0 |
| Costs | | | |
| Rent | 14,570 | 3,643 | 10.0 |
| Oil Cost | 53,010 | 13,253 | 36.4 |
| Toll Fees | 5,580 | 1,395 | 3.8 |
| Food Cost | 12,710 | 3,178 | 8.7 |
| Total Cost | 85,870 | 21,468 | 58.9 |
| Net Operating Income | 59,830 | 14,958 | 41.1 |
| Corporation tax | - | | |
| Net profit | 59,830 | 14,958 | 41.1 |

Source: Fieldwork, August 2017

5.15.2 Direct and Indirect Contribution

Total direct contribution is 20.5 per cent and is derived from the net profit. The total indirect contribution is 29.5 per cent of which 50 per cent is from the cost of sales and 50 per cent is from miscellaneous expenditure.

Table 5. 59: Direct and Indirect Contribution

| | BD Tk. | Direct (%) | Indirect (%) | Direct (BD Tk.) | Indirect (BD Tk.) |
|-----------------|---------|------------|--------------|-----------------|-------------------|
| Cost of sales | 73,160 | 0 | 50 | 0 | 36,580 |
| Utilities | 0 | 0 | 0 | 0 | 0 |
| Misc. | 12,710 | 0 | 50 | 0 | 6,355 |
| VAT | 0 | 0 | 0 | 0 | 0 |
| Corporation Tax | 0 | 0 | 0 | 0 | 0 |
| Net Profit | 59,830 | 50 | 0 | 29,915 | 0 |
| Total | 145,700 | 20.5 | 29.5 | 29,915 | 42,935 |

Source: Fieldwork, August 2017

5.15.3 Linkages and Leakages

Table 5.60 illustrates that the total rate of linkages is 36.9 per cent and the total rate of leakages is 22 per cent. The leakage items are oil costs as oil is sourced from other regions in Bangladesh. Another leakage item is toll fees because the toll fees payments do not stay in Cox's Bazar.

Table 5. 60: Linkages and Leakages

| | Costs (BD Tk.) | Share of Revenue (%) | Linkage (%) | Leakage (%) | Import Leakage (%) | Total Leakage (%) |
|-----------|----------------------|----------------------------|----------------|----------------|--------------------------|-------------------------|
| Rent | 14,570 | 10.0 | 100 | 0.0 | 0.0 | 0.0 |
| Oil Cost | 53,010 | 36.4 | 50 | 50 | 0.0 | 50 |
| Toll Fees | 5,580 | 3.8 | 0.0 | 100 | 0.0 | 100 |
| Food Cost | 12,710 | 8.7 | 100 | 0.0 | 0.0 | 0.0 |
| Total/Avg | 85,870 | 58.9 | 36.9% | 22.0% | 0.0% | 22.0% |

Source: Fieldwork, August 2017

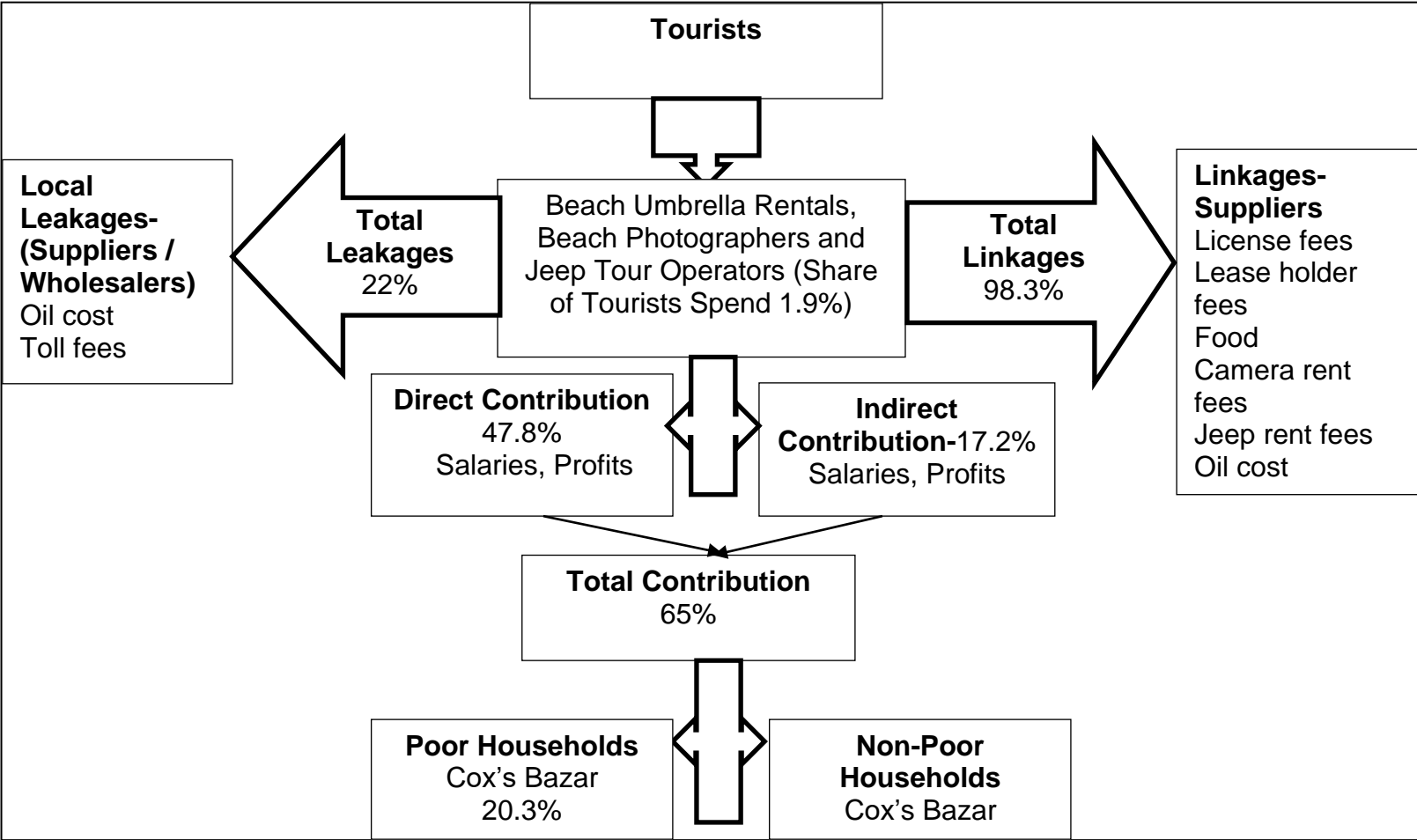
5.15.4 Tourism Value Chain Mapping Framework

A tourism value chain mapping framework is presented in figure 5.11 for the Tours and Beach Activities sector incorporating beach umbrella rentals, beach photographers and jeep tour operators. The mapping framework illustrates the total rate of leakages and linkages for the Tours and Beach Activities segment of the tourism value chain. In addition, the mapping framework represents data relating to direct and indirect contributions to poor and no-poor households in Cox's Bazar.

This section provides some background information based on the primary research in order to contextualize the data contained in the mapping framework. The beach umbrella owners are directly and indirectly linked with local suppliers such as furniture makers, beach umbrella wholesalers and local tradespeople such as painters. The beach umbrella rental business is indirectly linked to private sector companies including Berger Paint, Grameen Phone and Robi telecommunications. It was observed during fieldwork that the Berger brand is

advertised on all umbrellas and beach bins for rent and Grameen Phone and Robi Telecommunications were also promoted on a number of umbrellas. Overall although the three component segments of the tours and beach activities sector constitute a small proportion of tourists' expenditure, this sector generates relatively high levels of contributions to poor households.

Figure 5. 11: Tourism Value Chain Framework: Tours and Beach Activities



Source: Author's Own Work 2019

5.16 Tourism Value Chain Conceptual Framework for Cox's Bazar

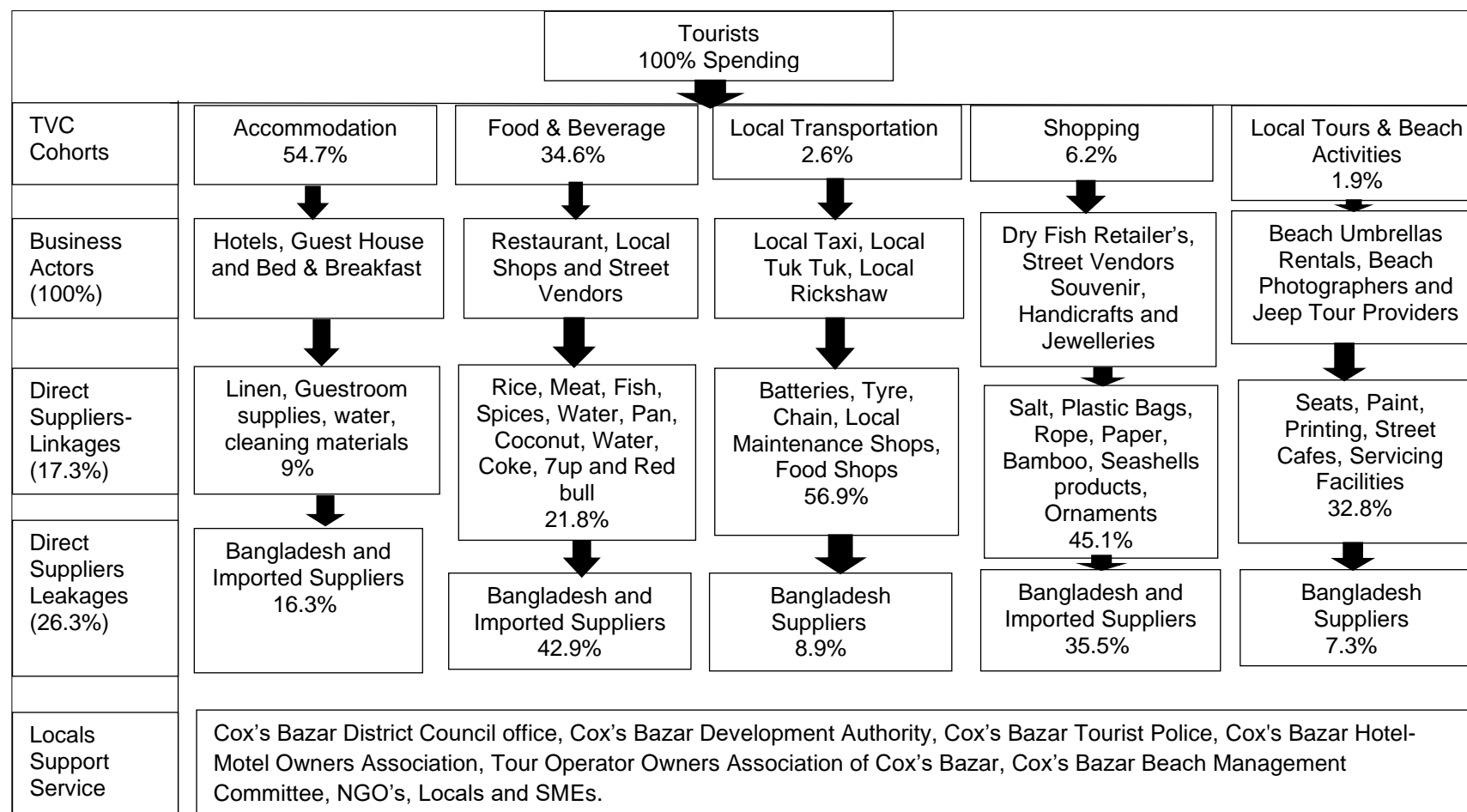
In the Literature Review (Mitchell et al. 2009; ODI 2009; Bolwig et al. 2010) relating to this research the role of the concept of a tourism value chain has been discussed. The value chain analysis facilitates understanding of tourists' expenditure within the chain and levels of linkages and leakages. There are several ways to measure the value chain analysis. In this thesis the measurement process encompasses two elements. Analysis of tourism value chain incorporating tourists' expenditure, five cohorts of business actors associated with suppliers. The scope of the analysis includes measurement of linkages and leakages (figure 5.12). Analysis of tourists' expenditure and tourism value chain actors' contribution to poor households' incomes (figure 5.13).

5.16.1 Analysis of Tourism Value Chain Mapping Framework

It can be seen (figure 5.12) that accommodation accounts for more than half of tourists' expenditure. There is a modest rate of linkages, but the total leakages rate is higher. More than a third of tourists' expenditure is allocated to the food and beverage sector. Although the rate of linkages is double that of the accommodation sector, it has the second highest level of leakages in the research sample primarily due to sourcing of branded beverages from other parts of Bangladesh. The local transport sector which comprises taxis, tuk tuks and rickshaws attracts the second lowest share of tourists spend. The sector has generally high levels of linkages but there is some variation between the actors in terms of leakages. Rickshaw pullers demonstrate the lowest leakages rate among all actors. The shopping category which has the third largest amount of tourists spend comprises two actors with very different patterns of linkages and leakages. The dried fish retail sector is the most integrated into the

local economy and has no imports. The handicrafts sector on the other hand is highly dependent on imports and consequently has the highest level of leakages and the lowest level of linkages. Tours and beach activities, incorporating beach umbrella rentals, beach photographers and jeep tour operators receive the lowest share of tourists spend and have average levels of linkages among the cohort and the third lowest level of leakages. Overall, it can be noted that the three actors (accommodation, food and beverage and shopping) which together attract over 95 per cent of tourists' total expenditure cumulatively have the highest levels of leakages.

Figure 5. 12: Tourism Value Chain Mapping Framework

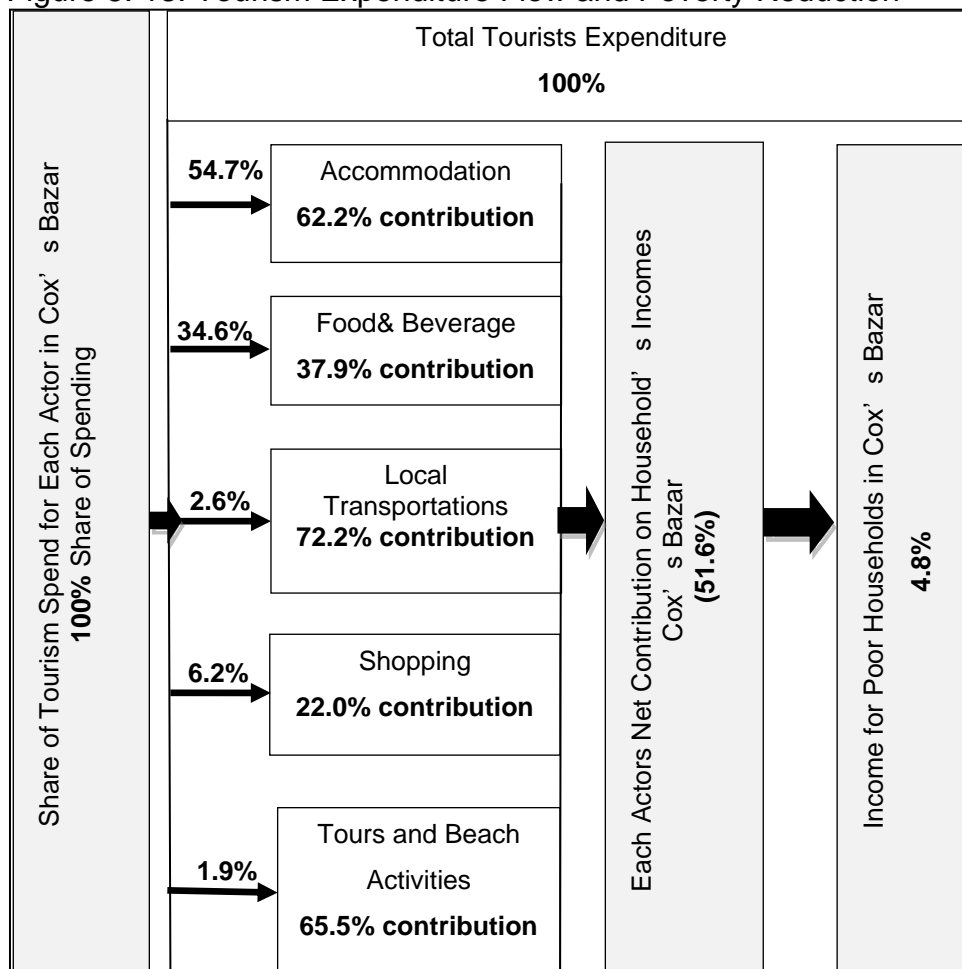


Source: Author's own work (2019) adapted from Inclusive Tourism, Linking Business Sectors to Tourism Markets, The International Trade Centre (ITC), Switzerland, 2010

5.16.2 Tourism Expenditure Flow and Poverty Reduction

The flow of tourists' expenditure to business actors and ultimately on to poor households is traced in figure 5.13.

Figure 5. 13: Tourism Expenditure Flow and Poverty Reduction



Source: Author's Own Work 2019

The accommodation sector which receives the largest proportion of tourists' expenditure has a less than one per cent net contribution to poor households' incomes. The second highest recipient of tourists spend is the food and beverage sector and this has the highest level of net contribution to poor households. However, this figure is still only 3.3 per cent. The shopping cohort has a very low level of contribution and the handicrafts sector makes a zero contribution to poor households due primarily to its high level of dependence on imports. The local transport sector which only attracts 2.6 per cent of tourists

spend, proportionately has almost the same level of contribution to poor households as the accommodation sector. Similarly, tours and beach activities which also receives a low level of tourists spend make the third highest contribution to poor households' income. Overall, the tourism value chain framework demonstrates that the contribution of tourists' expenditure to poor households' incomes in Cox's Bazar is 4.8 per cent.

5.17 Chapter Summary

This concept underpinning this chapter reflects the literature in chapter 2 (Porter 1985; Gereffi and Korzeniewicz 1994; Kaplinsky and Morris 2000; Mbaiwa 2000; Gereffi and Kaplinsky 2001; Gibbon and Ponte 2005; Cai et al. 2006; Meyer 2007; Fold and Larsen 2008; Harrison 2008; Mitchell et al. 2009; ODI 2009; Zhang et al. 2009; Bolwig et al. 2010; Nyaupane and Poudel 2011; Adiyia et al. 2015; Mitchell and Ashley 2016). A three- stage value chain mapping framework was developed incorporating tourists, suppliers and business actors. The first stage identified different types of tourists and their expenditure patterns which concluded that the highest level of expenditure per person was in the NGO tourist category, but this is a very small tourism market segment in Cox's Bazar. The mapping of the supply chain emphasised the important role of intermediaries within the Cox's Bazar tourism value chain.

The comprehensive analysis of the 12 business actors demonstrated a high degree of variation in the levels of linkages and leakages. There is evidence of an inverse relationship between the proportion of tourists spend received and the contribution to poor households' incomes in the case of the accommodation and tours and beach activities sectors. In terms of gender participation, there is clear evidence in the sample of low levels (8.6 per cent) of female participation which would appear to challenge some of the claims made by advocates of pro-

poor tourism about female economic empowerment (Fillmore 1994; Cleverdon and Kalisch 2000; Ashley and Roe 2002; Losby et. al. 2003; Pleumarom 2007; Scheyvens 2007; Ferguson 2011). The mapping process has laid the foundation for a comprehensive analysis of the relationship between the tourism value chain and poverty headcount ratio in chapter 6.

CHAPTER 6: TOURISM VALUE CHAIN AND POVERTY REDUCTION

6.1 Introduction

This chapter focuses on providing a detailed examination of the contribution of tourism expenditure in the tourism value chain to poor households' income in Cox's Bazar. The chapter begins by presenting results of research data relating to profiles of households in the research sample. The scope of these results incorporates household composition, expenditure, size, ethnicity and occupation in relation to poverty head count ratio. Comparison is drawn between poverty headcount ratios for households engaged in employment in the tourism and non-tourism sectors. The second section of this chapter builds on the tourism value chain mapping framework developed in chapter 5. This chapter provides detailed calculations relating to the contribution of expenditure by six categories of tourists (identified in chapter 5) to poor households' incomes. It also compares contribution to poor households' income by domestic tourists, diaspora tourists and foreign tourists. This is followed by analysing the contribution of five cohorts of tourism value chain actors to incomes of poor households.

The concept of poverty measurement is complex as evidenced in the diversity of approaches outlined in the literature review (chapter 2). This research follows the majority of pro-poor tourism reports in using an income-based definition of poverty, although this is the subject of some criticism (Sen 1999; Truong 2014). The researcher recognises that poverty is a multi-dimensional phenomenon encompassing a wider range of issues relating to education, freedom and dignity. However, for pragmatic reasons, an income-based definition based on poverty headcount ratio is employed because it is measurable whereas

intangible concepts such as dignity cannot be measured quantitatively (Mitchell 2019).

6.2 Profile of Households

The Bangladesh Bureau of Statistics' (BBS) official definition of a household relates to persons either related or unrelated living together sharing cooking facilities. Based on this definition, households can be classified into three categories namely (i) general (dwelling) households, (ii) institutional households (hospitals, clinics, jails and hostels) and (iii) other households such as offices and messes (BBS 2011). This research is concerned with general households and table 6.1 contains data relating to the research sample which incorporated 127 households.

Table 6. 1: Households' Characteristics

| Profile | Total | Total (%) |
|--|-------|-----------|
| Head of Household-Male | 93 | 73.2 |
| Head of Household-Female | 26 | 20.5 |
| Head of Household-Transgender | 8 | 6.3 |
| Male Income Source | 98 | 15 |
| Female Income Source | 32 | 5 |
| Transgender Income Source | 19 | 3 |
| Unemployed | 512 | 77 |
| Total Number of Person from (127 households) | 661 | 100 |
| Age (18-25) | 21 | 17 |
| Age (26-35) | 45 | 35 |
| Age (36-45) | 35 | 28 |
| Age (45-55) | 12 | 9 |
| Age (55+) | 14 | 11 |
| Total Households Questionnaires | 127 | 100% |

Source: Fieldwork, August 2017

The total number of people residing in the sample of households in the research was 657 including children. An overview of the general household characteristics shows that 93 head of households are male, 26 are female and 8 heads of households are transgender (Hijra). The second stage of the calculation identifies the source of household income and it demonstrates that

23 per cent of the total sample population are employed. Of this figure 5 per cent are female and 3 per cent are transgender and 15 per cent are male. Review of the age profile of the respondents demonstrates that the largest group comprises the 26-35 age group and lowest number of household occupants was in 45 – 55-year-old age range.

6.2.1 Household Expenditure (Non-Durable and Durable)

Households' expenditure is categorised into two sections (i) non-durable items and (ii) durable items. The non-durable items expenditure is predominantly food, fuel, electricity, education, kerosene oil and rent. The durable items expenditure primarily relates to radio, TV, satellite dishes and mobile phone bills. Table 6.2 illustrates the categories of expenditure from the 127 households within the sample. An overview of the responses shows that the highest level of expenditure on non-durable items (79 per cent) relates to food. The food expenditure is the highest in the non-durable category because of the relatively large household sizes (average of 5.2 people per household). The second highest expenditure is fuel (wood) at 6 per cent which is required for preparing food as most of the households use open fires for cooking. The third highest expenditure is kerosene oil due to lack of electricity facilities in many houses and frequent power cuts which are the norm in rural Bangladesh. The level of expenditure relating to durable expenditure is relatively low and includes products such as mobile bills (4 per cent) and TV and satellite dishes (1 per cent). It was apparent during the data collection stage that all households have at least one mobile phone.

Table 6. 2: Households' Expenditure (Non-Durable and Durable)

| Household Expenditure (Monthly BD Tk.) | Total | Total (%) |
|--|-----------|-----------|
| Household expenditure-Food | 1,018,600 | 79 |
| Non-Food Items expenditure (Non-Durable) | 0 | 0 |
| Fuel (Wood Fire Items) | 81,050 | 6 |
| Electricity | 34,300 | 3 |
| Toiletries | 0 | 0 |
| Education | 26,280 | 2 |
| Clothing | 0 | 0 |
| Kerosene Oil | 53,350 | 4 |
| Rent | 12,400 | 1 |
| Other | 150 | 0 |
| Durable Items expenditure | 0 | 0 |
| Radio/TV/Dish | 13,300 | 1 |
| Mobile Phones | 55,700 | 4 |
| White Goods | 0 | 0 |
| Scooter/Bicycle | 0 | 0 |
| Other | 2,300 | 0 |
| Remittance Income/Other | 0 | 0 |
| Total | 1,297,430 | 100% |

Source: Fieldwork, August 2017

6.2.2 Poverty Headcount by Village

Table 6.3 shows that the minimum average monthly income per household is BD Tk. 8,360 and the maximum average monthly income is BD Tk. 46,160. The average monthly income per household is BD Tk. 13,180. The size of households ranges from a minimum size of 2.4 members (including children) to a maximum household size of 9 with an average household size of 5.2 people. An analysis of the data relating to poverty headcount ratio in the different villages indicates that overall, all the villages in the sample would be classified as non-poor based on World Bank PPP criteria (USD 1.90 per person per day). The lowest levels of poverty may be observed in Adorsha Gram village and Guldigir Para village. All calculations are estimated after income tax deductions according to National Board of Revenue Bangladesh (NBRB 2019). The tax calculations are based on a tax-free threshold of BD Tk. 20,833 per month, 10 per cent tax rate from BD Tk. 20,833 to BD Tk. 33,333, 15 per cent tax from BD

Tk. 33,333 to BD Tk. 41,667. 20 per cent tax if monthly income is BD Tk. 41,667 to BD Tk. 50,000 and 25 per cent tax if monthly income is between BD Tk. 50,000 and BD Tk. 250,000 (calculation date August 2017). The calculation of Poverty Headcount Ratio (PHR) is based on World Bank Purchasing Power Parity (PPP) (World Bank 2015).

Table 6. 3: Poverty Headcount by Village

| Villages | Number of ques. | Monthly Income Avg. (BD Tk.) | Size of household (%) | Number of persons in households | Number of poor individuals | PHR |
|----------------|-----------------|------------------------------|-----------------------|---------------------------------|----------------------------|------|
| TNT Coloni | 21 | 21,850 | 4.7 | 98 | 4 | 0.04 |
| Podanodil Para | 19 | 9,079 | 5.6 | 107 | 81 | 0.76 |
| Gitipolli | 13 | 8,385 | 5.2 | 67 | 43 | 0.64 |
| Charpara | 13 | 11,000 | 4.8 | 63 | 16 | 0.25 |
| Islamabad | 11 | 9,545 | 5.2 | 57 | 24 | 0.42 |
| Natun Para | 11 | 13,182 | 5.1 | 56 | 6 | 0.11 |
| Link Road | 9 | 11,556 | 5.1 | 46 | 17 | 0.37 |
| Adorsha Gram | 8 | 9,397 | 2.4 | 19 | 0 | 0.00 |
| Samity Para | 6 | 15,833 | 6.5 | 39 | 11 | 0.28 |
| Bagan Para | 6 | 16,167 | 5.0 | 30 | 8 | 0.27 |
| Guldigir Para | 5 | 46,160 | 9.0 | 45 | 0 | 0.00 |
| Bonorupa Para | 5 | 8,360 | 6.0 | 30 | 26 | 0.87 |
| Total / Avg. | 127 | 13,180 | 5.2 | 657 | 236 | 0.36 |

Source: Fieldwork, August 2017

During the data collection period the official exchange rate was calculated as 1 USD equivalent to BD Tk. 81.04 (3rd August 2017). The World Bank poverty line is USD 1.90 per person per day (World Bank 2015). Therefore, for the purposes of this research the poverty line expressed in BD Taka on a per person per month basis is calculated as BD Tk. 1,871. The PHR ranking employed in this research allocates 0 to 1 rank to non-poor and 1 to up to highest score rank to

poor. Analysis of the PHR data highlights that a total of 36 per cent of residents of households in the sample of 657 people may be classified as poor based on the World Bank poverty line.

6.2.3 Household Ethnic Group and Poverty Headcount Ratio

The research analysed poverty rates according to ethnic group among the sample. The three main ethnic groups in the Cox's Bazar region which are the majority Bengalis (n=113), the minority Rakhain (n=5) and the Rohingya (n=9) are included within the households' sample. 113 households comprising 569 people in the first ethnic group (Bengali) participated in the research (Table 6.4). Results show that their monthly average income is BD Tk. 11,206 and the average household size is 5. The number of poor individuals is 232 out of 569 persons and the poverty headcount ratio is 0.41. Analysis of the data relating to this ethnic group shows that the poverty headcount ratio is higher than other two groups, but all household income is above the poverty line.

Ten households from the Rohingya ethnic minority group completed questionnaires, and this sample was relatively low compared to the majority Bengali community. Table 6.4 demonstrates that for the Rohingyas, average monthly income per household is BD Tk. 21,629 with a smaller average household size (4.8) compared to Bengalis (5). The number of poor people is 8 in a sample size of 9 households comprising 43 residents and the poverty headcount ratio is 0.09 which is relatively low.

The Rakhain people constitute the third ethnic community in this research. The sample size was relatively low comprising only 5 households and their average monthly income is BD Tk. 42,566. The average size of households is relatively large at 9. Despite this, their income level is significantly higher than the other

two groups. This may be because many members of this community are self-employed small business owners engaged in the tourism value chain by supplying goods to souvenir retailers. Overall, the results show that in the Rakhine sample the poverty headcount ratio is zero, because the monthly average income is relatively high.

Table 6. 4: Households' Ethnic Group and Poverty Headcount Ratio

| Ethnicity | Number of quest. | Average monthly income per household (BD Tk.) | Size of household (%) | Number of persons in household | Number of poor individuals | PHR |
|-----------------|------------------|---|-----------------------|--------------------------------|----------------------------|------|
| Bengali | 113 | 11,206 | 5.0 | 569 | 232 | 0.41 |
| Rohingya | 9 | 21,629 | 4.8 | 43 | 4 | 0.09 |
| Rakhain | 5 | 42,566 | 9.0 | 45 | 0 | 0.00 |
| Total / average | 127 | 13,180 | 5.2 | 657 | 236 | 0.36 |

Source: Fieldwork, August 2017

Picture 6. 1: Data Collection Households



Picture-1: Bengali Ethnicity-
Guldigirpara Village



Picture-3: Bengali Ethnicity-
Padnad Del Village



Picture-2: Bengali Ethnicity
(Transgender)-Adarsha Gram Village



Picture-4: Rohingya Ethnicity –
TNT Colony Village



Picture-5: Rakhain Ethnicity-
Bonorupa Para Village

Source: Fieldwork, August 2017

6.2.4 Occupations and Poverty Headcount Ratio

The research results cover 28 occupations in Cox's Bazar (table 6.5) and also incorporates data relating to total poverty headcount ratio.

Table 6. 5: Occupations and Poverty Headcount Ratio

| Occupation | Number of questionnaires | Average size of household | PHR |
|-------------------|--------------------------|---------------------------|------|
| Day Labour | 36 | 5.5 | 0.26 |
| Rickshaw puller | 13 | 5.5 | 0.49 |
| Tuk Tuk Driver | 9 | 5.7 | 0.43 |
| Beggar | 9 | 2.2 | 0.00 |
| Dry fish vendor | 7 | 5.3 | 0.00 |
| House worker | 5 | 4.4 | 0.86 |
| Hotel worker | 5 | 4.6 | 0.00 |
| Fisherman | 4 | 4.5 | 0.00 |
| Tea shop owner | 3 | 10.0 | 0.53 |
| Tailor | 3 | 8.3 | 0.56 |
| Shop Owner | 3 | 5.7 | 0.00 |
| Seasonal worker | 3 | 5.3 | 1.00 |
| Restaurant worker | 3 | 4.0 | 0.33 |
| Jewellery seller | 3 | 4.7 | 0.00 |
| Cleaner | 3 | 5.7 | 1.00 |
| Unemployed | 2 | 3.0 | 0.67 |
| Photocopy helper | 2 | 4.5 | 0.56 |
| Fish cleaner | 2 | 4.5 | 1.00 |
| Electrician | 2 | 6.5 | 0.54 |
| Barber | 2 | 5.5 | 0.45 |
| Tea shop helper | 1 | 6.0 | 1.00 |
| Street vendors | 1 | 5.0 | 0.00 |
| Security | 1 | 6.0 | 1.00 |
| Painter | 1 | 8.0 | 0.00 |
| Handicraft vendor | 1 | 3.0 | 0.00 |
| Fish Seller | 1 | 3.0 | 0.00 |
| Farmer | 1 | 4.0 | 0.00 |
| Boat driver | 1 | 4.0 | 0.00 |
| Total / average | 127 | 5.2 | 0.36 |

Source: Fieldwork, August 2017

The largest occupation category comprising 36 members consists of day labourers. Analysis of the data indicates that the occupations with the highest poverty headcount ratio are cleaners, fish cleaners, seasonal workers, security officers and tea shop helpers. The total number of occupations categorised as poor is 5 out of 28 occupations listed below in table 6.5. A worker earning below BD Tk. 1,871 per month is categorised as poor. Based on these figures the

research data indicates that 23 occupations would not be classified as poor based on the poverty headcount ratio (0 = non poor, 1 = poor). It should be noted that the occupation category classified as beggar in the sample is largely comprised of the hijra (transgender) community which is highly organised in terms of soliciting donations from businesses and tourists and consequently is classified as non-poor. Overall, the poverty headcount ratio for all households in the sample is 0.36.

6.2.5 Employment and Poverty Headcount Ratio

In this section research data is analysed in order to compare poverty headcount ratios for households engaged in employment in the tourism value chain with those households who are not directly or indirectly employed in the tourism sector. Table 6.6 below indicates that the total poverty headcount ratio is 0.36 based on 28 occupations from 127 households' questionnaires. A total of 11 occupations directly work in the tourism sector and 17 occupations are directly working in the non-tourism sector. The World Bank poverty threshold was applied to each of the 127 households. For each household the daily threshold income was calculated by multiplying USD 1.90 by the number of people in the household. The result was then multiplied by 31 days and the result was then converted to BD Taka at an exchange rate of BD Tk. 81.04. The result is the maximum monthly income for the household to be considered poor, based on the World Bank poverty threshold amount of BD Tk. 1.871 per person on a daily basis. The result shows that within households where members work directly or indirectly in tourism, only 2 occupations out of 11 occupations are classified as poor. The occupations are seasonal workers and the tea shop helpers. In the non-tourism sector, 3 out of 17 occupations (cleaner, fish cleaner and security) are classified as poor. The results also indicate that 99 individuals classified as

are poor out of 268 people working in the tourism sector and 137 individuals' people are poor out of 389 individual people who are working in non-tourism related occupations.

Table 6. 6: Employment and Poverty Headcount Ratio

| Occupation | Number of individuals | | |
|-------------------------|-----------------------|-------------|-------|
| | Tourism | Non-tourism | Total |
| Day Labour | | 51 | 51 |
| Rickshaw puller | 35 | | 35 |
| Tuk Tuk Driver | 22 | | 22 |
| Beggar | | 0 | 0 |
| Dry fish vendor | 0 | | 0 |
| House worker | | 19 | 19 |
| Hotel worker | 0 | | 0 |
| Fisherman | | 0 | 0 |
| Tea shop owner | 16 | | 16 |
| Tailor | | 14 | 14 |
| Shop Owner | | 0 | 0 |
| Seasonal worker | 16 | | 16 |
| Restaurant worker | 4 | | 4 |
| Jewellery seller | 0 | | 0 |
| Cleaner | | 17 | 17 |
| Unemployed | | 4 | 4 |
| Photocopy helper | | 5 | 5 |
| Fish cleaner | | 9 | 9 |
| Electrician | | 7 | 7 |
| Barber | | 5 | 5 |
| Tea shop helper | 6 | | 6 |
| Street vendors | 0 | | 0 |
| Security | | 6 | 6 |
| Painter | | 0 | 0 |
| Handicraft vendor | 0 | | 0 |
| Fish Seller | | 0 | 0 |
| Farmer | | 0 | 0 |
| Boat driver | | 0 | 0 |
| Total Poor individuals | 99 | 137 | 236 |
| All individuals | 268 | 389 | 657 |
| Poverty Headcount Ratio | 0.37 | 0.35 | 0.36 |

Source: Fieldwork, August 2017

Overall, the data demonstrates that a total of 236 persons out of 657 in the sample may be classified as poor. The total poverty headcount ratio is 0.36 and the tourism related occupations poverty headcount ratio is 0.37. The non-tourism related occupations' poverty headcount ratio at 0.35 is slightly lower than the tourism related occupations.

6.3 Contribution to Poor Households by Tourists Expenditure

This section examines the relationship between expenditure by different types of tourist categories and the level of contribution to poor households. Research conducted with 80 tourists examined their primary purpose for visiting Cox's Bazar. The primary purpose of the visit has been categorised under 6 categories (i) Holiday (n=52), (ii) Conference (n=8), (iii) NGO (n=5), (iv) Business (n=10), (v) Friends and Family Visit (n=1) and (vi) Day Visit (n=4).

6.3.1 Contribution to Poor Households by Holiday Tourists

Analysis of questionnaires indicates that out of 80 tourists, 52 can be categorised as holiday tourists. The contribution of the expenditure of this category of tourist both in terms of direct and indirect contribution to the accommodation actors and contribution to poor households' incomes in Cox's Bazar is illustrated in table 6.7. The two most significant areas of expenditure for holiday tourists are accommodation and restaurants. Accommodation which generates 52 per cent of holiday tourists' expenditure has a 62.2 per cent total contribution to local households which includes direct and indirect contributions. Out of BD Tk. 330,700 total expenditure in this category, a low proportion of 0.5 per cent goes to poor households as income. The second category which comprises restaurants has a similar total contribution, but it generates 3.1 per cent income for poor households. Holiday tourists spend significantly less money on food vendors (7.4 per cent.), local transportation (1.9 per cent) and tours and beach activities (2.2 per cent) but this expenditure has a higher contribution due to the high level of linkages. Overall, it can be seen that in terms of holiday tourists' expenditure, the most significant income for poor households relates to spending in restaurants and the total income for poor

households from all categories of expenditure by this category of tourist is 4.9 per cent.

Table 6. 7: Holiday Tourists' Contribution to Poor Households

| | Spending (BD Tk.) | Share (%) | Contribution (%) | Head count (%) | Income for poor (%) |
|-----------------------------|----------------------|--------------|---------------------|----------------------|------------------------|
| Total contribution | | | | | |
| Accommodation | 330,700 | 52.0 | 62.2 | 1.6 | 0.5 |
| Food (Restaurant) | 141,270 | 22.2 | 46.3 | 29.8 | 3.1 |
| Food (Vendors) | 47,090 | 7.4 | 37.3 | 17.7 | 0.5 |
| Food (Beverage) | 47,090 | 7.4 | 13.4 | 0.4 | 0.0 |
| Dried fish | 25,433 | 4.0 | 18.2 | 10.9 | 0.1 |
| Souvenir/Handicrafts | 18,817 | 3.0 | 26.1 | 1.9 | 0.0 |
| Tours and Beach Activity | 14,010 | 2.2 | 65.0 | 31.2 | 0.4 |
| Transportation, Taxi | 333 | 0.1 | 70.0 | 20.8 | 0.0 |
| Transportation, Tuktuk | 6,083 | 1.0 | 70.0 | 20.8 | 0.1 |
| Transportation, Rickshaw | 4,808 | 0.8 | 80.5 | 30.8 | 0.2 |
| Total/Avg. | 635,635 | 100% | | | 4.9% |

Source: Fieldwork, August 2017

6.3.2 Contribution to Poor Households by Business Tourists

The analysis of business tourists' results in Table 6.8 indicates that more than half (52.6 per cent) of the share of business tourists' expenditure is on accommodation. The total contribution is 62.2 per cent and the level of contribution to poor households' income is 0.5 per cent. The results in Table 6.8 demonstrate that the highest income for poor households (2.6 per cent) relates to the food (restaurant) category. Business tourists spend an overall average of BD Tk. 11,160 on food (restaurants) and this has a total contribution to local households' income of 61.2 per cent and income for poor households comprises 2.6 per cent. The other items of expenditure contribute significantly less such as food (vendors) 0.4 per cent, dried fish 0.1 per cent, souvenir and handicrafts 0 per cent, tours and beach activities 0.6 per cent, local transportation 0.5 per cent, it can be observed that the local transportation

category has a higher contribution of above 70 per cent but relatively low income for poor households because expenditure on local transport by the business tourism segment is relatively low. Overall, the total income for poor households from expenditure by the business segment of the tourism market in Cox's Bazar is 4.8 per cent.

Table 6. 8: Business Tourists' Contribution to Poor Households

| | Spending (BD Tk.) | Share (%) | Contribution (%) | Headcount (%) | Income for poor (%) |
|-----------------------------|----------------------|--------------|---------------------|------------------|------------------------------|
| Total contribution | | | | | |
| Accommodation | 30,900 | 52.6 | 62.2 | 1.6 | 0.5 |
| Food (Restaurant) | 11,160 | 19.0 | 46.3 | 29.8 | 2.6 |
| Food (Vendors) | 3,720 | 6.3 | 37.3 | 17.7 | 0.4 |
| Food (Beverage) | 3,720 | 6.3 | 13.4 | 0.4 | 0.0 |
| Dried fish | 3,700 | 6.3 | 18.2 | 10.9 | 0.1 |
| Souvenir/Handicrafts | 1,800 | 3.1 | 26.1 | 1.9 | 0.0 |
| Tours and Beach Activity | 1,640 | 2.8 | 65.0 | 31.2 | 0.6 |
| Transportation, Taxi | 900 | 1.5 | 70.0 | 20.8 | 0.2 |
| Transportation, Tuktuk | 1,000 | 1.7 | 70.0 | 20.8 | 0.2 |
| Transportation, Rickshaw | 200 | 0.3 | 80.5 | 30.8 | 0.1 |
| Total/Avg. | 58,740 | 100% | | | 4.8% |

Source: Fieldwork, August 2017

6.3.3 Contribution to Poor Households by Conference Tourists

Table 6.9 incorporates data relating to conference tourists' expenditure during their stay in Cox's Bazar. The result shows that conference tourists spend a large amount of money on accommodation, but this results in a relatively small level of income for poor households (0.6 per cent). The data indicates that the total contribution of conference tourist's expenditure is 62.2 per cent. It can be observed from the data analysis that only 18.4 per cent of conference tourists' expenditure is for restaurant food which generates a 2.5 per cent income for poor households. A detailed analysis of the result shows that only 0.4 per cent

of poor households' income is from the street food vendors, 0.2 per cent is from taxis and 0.1 per cent is from tuk tuk drivers.

Table 6. 9: Conference Tourists' Contribution to Poor Households

| | Spending (BD Tk.) | Share (%) | Contribution (%) | Headcount (%) | Income for poor (%) |
|-----------------------------|----------------------|--------------|---------------------|------------------|---------------------------|
| Total contribution | | | | | |
| Accommodation | 81,600 | 64.6 | 62.2 | 1.6 | 0.6 |
| Food (Restaurant) | 23,220 | 18.4 | 46.3 | 29.8 | 2.5 |
| Food (Vendors) | 7,740 | 6.1 | 37.3 | 17.7 | 0.4 |
| Food (Beverage) | 7,740 | 6.1 | 13.4 | 0.4 | 0.0 |
| Dried fish | 700 | 0.6 | 18.2 | 10.9 | 0.0 |
| Handicrafts | 2,400 | 1.9 | 26.1 | 1.9 | 0.0 |
| Tours and Beach Activity | 190 | 0.2 | 65.0 | 31.2 | 0.0 |
| Transportation, Taxi | 2,000 | 1.6 | 70.0 | 20.8 | 0.2 |
| Transportation, Tuktuk | 500 | 0.4 | 70.0 | 20.8 | 0.1 |
| Transportation, Rickshaw | 200 | 0.2 | 80.5 | 30.8 | 0.0 |
| Total/Avg. | 126,290 | 100% | | | 4.0% |

Source: Fieldwork, August 2017

It can be argued that these categories generate relatively low income because of lower expenditure from the tourists but they have relatively high total contribution to poor households. The overall data demonstrates that, the conference tourism segment generates an income of 4 per cent for poor households in Cox's Bazar.

6.3.4 Contribution to Poor Households by NGO Tourists

Table 6.10 illustrates the NGO tourists' expenditure and its contribution to poor households' incomes.

Table 6. 10: NGO Tourists' Contribution to Poor Households

| Total contribution | Spending (BD Tk.) | Share (%) | Contribution (%) | Headcount ratio (%) | Income for poor (%) |
|-----------------------------|----------------------|--------------|---------------------|------------------------|---------------------------|
| Accommodation | 55,900 | 56.2 | 62.2 | 1.6 | 0.5 |
| Food (Restaurant) | 16,740 | 16.8 | 46.3 | 29.8 | 2.3 |
| Food (Vendors) | 5,580 | 5.6 | 37.3 | 17.7 | 0.4 |
| Food (Beverage) | 5,580 | 5.6 | 13.4 | 0.4 | 0.0 |
| Dried fish | 0 | 0.0 | 18.2 | 10.9 | 0.0 |
| Handicrafts | 5,400 | 5.4 | 26.1 | 1.9 | 0.0 |
| Tours and Beach Activity | 2,320 | 2.3 | 65.0 | 31.2 | 0.5 |
| Transportation, Taxi | 8,000 | 8.0 | 70.0 | 20.8 | 1.2 |
| Transportation, Tuktuk | 0 | 0.0 | 70.0 | 20.8 | 0.0 |
| Transportation, Rickshaw | 0 | 0.0 | 80.5 | 30.8 | 0.0 |
| Total/Average | 99,520 | 100% | | | 4.9% |

Source: Fieldwork, August 2017

The NGO tourists' highest expenditure is on the accommodation sector category and this sector generates only 0.5 per cent income for poor households which is very low compared to the restaurant food sector at 2.3 per cent. It can be seen that only 16.8 per cent of NGO tourists' expenditure goes to restaurant food sector while 56.2 per cent expenditure is allocated to the accommodation sector. The analysis of the results indicate that income generated for poor households based on expenditure by NGO tourists is 0.4 per cent from street food vendors, 0 per cent is from souvenir or handicrafts, 0.5 per cent is from tours and beach activities and a relatively high proportion of 1.2 per cent goes to poor households from the transportation (taxi) category. However, the analysis of the data shows that the NGO tourist expenditure on tours and beach activities and transportations has a higher contribution and moderately higher income for poor household in Cox's Bazar. Research data from this relatively small sample of NGO tourists indicates that overall income for poor households from this segment of the tourism market is 4.9 per cent.

6.3.5 Contribution to Poor Households by Day Visitors

Data presented in table 6.11 indicates that 42.8 per cent of the share of day visitor tourists' expenditure goes to restaurants which contribute 5.9 per cent income for poor households.

Table 6. 11: Day Visit Tourists' Spend and Contribution to Poor Households'

| Total contribution | Spending (BD Tk.) | Share (%) | Contribution (%) | Headcount ratio (%) | Income for poor (%) |
|--------------------------|-------------------|-----------|------------------|---------------------|---------------------|
| Accommodation | 0 | 0.0 | 62.2 | 1.6 | 0.0 |
| Food (Restaurant) | 693 | 42.8 | 46.3 | 29.8 | 5.9 |
| Food (Vendors) | 231 | 14.3 | 37.3 | 17.7 | 0.9 |
| Food (Beverage) | 231 | 14.3 | 13.4 | 0.4 | 0.0 |
| Dried fish | 125 | 7.7 | 18.2 | 10.9 | 0.2 |
| Handicrafts | 50 | 3.1 | 26.1 | 1.9 | 0.0 |
| Tours and Beach Activity | 0 | 0.0 | 65.0 | 31.2 | 0.0 |
| Transportation, Taxi | 0 | 0.0 | 70.0 | 20.8 | 0.0 |
| Transportation, Tuktuk | 255 | 15.7 | 70.0 | 20.8 | 2.3 |
| Transportation, Rickshaw | 35 | 2.2 | 80.5 | 30.8 | 0.5 |
| Total/Avg. | 1,620 | 100% | | | 9.8% |

Source: Fieldwork, August 2017

Analysis of the results illustrate that day visitors spend on food and transportation (tuk tuks) generates 2.3 per cent income for poor households. The research indicates that day visit tourists generate 9.8 per cent overall income for poor households. The income is significantly higher relative to other categories of tourists such as holiday, business, NGOs and conference tourists.

6.3.6 Contribution to Poor Households by VFF Tourists

The sample size of the category of tourists visiting friends and family only comprised one respondent out of 80 tourist questionnaires.

Table 6. 12: Visiting F and F Tourists' Contribution to Poor Households

| Total contribution | Spending (BD Tk.) | Share (%) | Contribution (%) | Headcount ratio (%) | Income for poor (%) |
|-----------------------------|----------------------|--------------|---------------------|------------------------|---------------------------|
| Accommodation | 17,999 | 75.3 | 62.2 | 1.6 | 0.7 |
| Food | | | | | |
| (Restaurant) | 3,420 | 14.3 | 46.3 | 29.8 | 2.0 |
| Food (Vendors) | 1,140 | 4.8 | 37.3 | 17.7 | 0.3 |
| Food (Beverage) | 1,140 | 4.8 | 13.4 | 0.4 | 0.0 |
| Dried fish | 0 | 0.0 | 18.2 | 10.9 | 0.0 |
| Handicrafts | 0 | 0.0 | 26.1 | 1.9 | 0.0 |
| Tours and Beach Activity | 0 | 0.0 | 65.0 | 31.2 | 0.0 |
| Transportation, Taxi | 0 | 0.0 | 70.0 | 20.8 | 0.0 |
| Transportation, Tuktuk | 200 | 0.8 | 70.0 | 20.8 | 0.1 |
| Transportation, Rickshaw | 0 | 0.0 | 80.5 | 30.8 | 0.0 |
| Total/Avg. | 23,899 | 100% | | | 3.1% |

Source: Fieldwork, August 2017

The tourist's expenditure demonstrates a 14.3 per cent share in the restaurants (food) category and 2 per cent income for poor households. Other categories of expenditure result in relatively low income for poor households. The largest area of expenditure (75.3 per cent) which is accommodation only generates 0.7 per cent income for poor households. The overall income from tourism expenditure by Visiting Friends and Family Tourists for poor household is 3.1 per cent in Cox's Bazar. However, a sample size of one respondent is a limitation on the significance of the data.

6.3.7 Tourists' Contribution to Poor Households Income

Table 6.13 describes different categories of tourists visit in Cox's Bazar. Tourist were categorised under six headings from the sample of 80 tourists. The first category of tourists is holiday tourists and the share of expenditure in the value chain for accommodation, food, transportation, souvenirs and tours and beach activities is 67.2 per cent. This expenditure has 50.6 per cent weighted

contribution for local households in Cox's Bazar but a very small proportion (4.9 per cent) of money goes to poor households. The second category of tourists is conference tourists whose share of total expenditure is 13.4 per cent although the number of tourists in this category is relatively low. The weighted contribution is 54 per cent and only 4 per cent constitutes income for poor households. NGO tourists and business tourists are a growing segment in Cox's Bazar tourism sector and these two categories have a relatively high contribution to income for the poor households at 4.9 per cent and 4.8 per cent respectively. Day visitors constitute only 0.2 per cent share of tourist spend, however, their contribution is 42 per cent. Major expenditures for the day visitors are food, transportation, souvenirs and tours and beach activities items. The results show a higher level of income (9.8 per cent) for poor households compared with other types of tourists.

Table 6. 13: Income for Poor by Tourist Categories

| Purpose of visit | Share of tourist spend (%) | Contribution to household income (%) | Income for poor (%) |
|---------------------------|----------------------------|--------------------------------------|---------------------|
| Holiday | 67.2 | 50.6 | 4.9 |
| Conference | 13.4 | 54.0 | 4.0 |
| NGO | 10.5 | 54.1 | 4.9 |
| Business | 6.2 | 51.0 | 4.8 |
| Visiting Friends & Family | 2.5 | 56.5 | 3.1 |
| Day Visit | 0.2 | 42.0 | 9.8 |
| Total/Average | 100% | 51.6% | 4.8% |

Source: Fieldwork, August 2017

6.3.8 Contribution to Poor Households by Tourist Segments

The impact of tourism expenditure in developing countries is normally discussed in the context of foreign tourist and domestic tourism is under researched (Ghimire 2001; Scheyvens 2007). However, given the Cox's Bazar tourism industry's dependence on domestic tourists it is useful to provide a comparison of the contribution to poor households' income by domestic, diaspora and

foreign tourist (table 6.14). It can be seen that domestic and diaspora tourists constitute 90 per cent of tourists spend and their contribution to poor households is similar to that of foreign tourists.

Table 6. 14: Tourist Segments' Contribution to Poor Households

| Category | Share of tourist spend (%) | Weighted contribution to household income (%) | Income for poor (%) |
|---------------|----------------------------|---|---------------------|
| Domestic | 82.4 | 51.3 | 4.8 |
| Diaspora | 7.6 | 51.2 | 4.5 |
| Foreign | 10.0 | 54.2 | 4.9 |
| Total/Average | 100% | 51.6% | 4.8% |

Source: Fieldwork, August 2017

6.4 Business Actors' Contribution to Poor Households

Table 6.15 synthesises the data from expenditure by different categories of tourists to illustrate the overall contribution of tourism value chain actors to poor households' incomes.

Table 6. 15: Business Actors' Contribution to Poor Households.

| Business Actors | Share of spend (%) | Gross contribution (%) | Net contribution (%) | Income for poor (%) |
|----------------------------|--------------------|------------------------|----------------------|---------------------|
| Accommodation | 54.7 | 62.2 | 34.0 | 0.5 |
| Food & Beverage | 34.6 | 37.9 | 13.1 | 3.3 |
| Dried fish | 3.2 | 18.2 | 0.6 | 0.1 |
| Souvenir/Handicrafts | 3.0 | 26.1 | 0.8 | 0.0 |
| Tours and Beach Activities | 1.9 | 65.0 | 1.2 | 0.4 |
| Transportation, Taxi | 1.2 | 70.0 | 0.8 | 0.2 |
| Transportation, Tuktuk | 0.8 | 70.0 | 0.6 | 0.1 |
| Transportation, Rickshaw | 0.6 | 80.5 | 0.4 | 0.1 |
| Total / Avg. | 100 | 53.7 | 51.6 | 4.8 |

Source: Fieldwork, August 2017

The largest beneficiary of spending by all categories of tourists is the accommodation sector. Consequently, it can be seen that this sector has the highest gross and net contribution to local households. However, the contribution to poor households is relatively low due to weak linkages with the local economy. The food and beverage sector has the highest level of

contribution to poor households' income despite having a significantly smaller share of tourist expenditure than the accommodation sector. The third cohort of actors in the tourism value chain comprises dried fish retailers and souvenirs and handicrafts vendors. Income for poor households generated by these actors is limited due to high overheads in the case of the former and high dependency on imports in the case of the latter. The last two cohorts are tours and beach activities and local transportation (tuk tuk and rickshaw). These actors share similar characteristics in terms of share of tourists' expenditure and gross and net contributions to households. Their contribution to poor household's income ranges from 0.1 per cent to 0.4 percent.

6.5 Chapter Summary

Analysis of the research findings outlined in this chapter indicates that there is significant variation in the level of contribution of different categories of tourists to poor households. The tourism value chain actor with the dominant share of tourists' expenditure makes a negligible contribution to poor households' income. High level of employment of residents of poor households and strong linkages to the local economy appear to be the factors which have the most impact on alleviating poverty in poor households. In terms of employment there was a slightly higher total poverty headcount ratio of 0.37 for tourist related occupations compared to 0.35 for non-tourism related occupations. The significance of often overlooked smaller actors in the value chain, who often operate in the informal economy is evident in the findings outlined in this chapter. This chapter has demonstrated the potential of relating a value chain analysis framework to measurement of poverty headcount ratios in order to identify levels of contribution to poor households' income. It has built on the research outlined in chapter 5 relating to categorization of different segments of

the tourism market and associated patterns of expenditure. The construction of the mapping framework facilitates analysis of the flow of tourists' expenditure to actors in the tourism value chain and the contribution (or lack thereof) to incomes of poor households in Cox's Bazar.

CHAPTER 7: DISCUSSION AND RECOMMENDATIONS

7.1 Introduction

This chapter discusses the findings of the quantitative research outlined in chapter 5 and chapter 6 and discusses their broader significance. Conclusions and recommendations relating to this research are made based on the findings contained in the previous chapters. The conclusions and recommendations are based on analysis of the quantitative data gathered during the field research, the mapping of the tourism value chain in Cox's Bazar and a review of literature relating to the relationship between tourism and poverty reduction. In the first part of this chapter the seven research questions developed to address the four research objectives specified in chapter one is revisited and research findings are presented for each research question. In the second part of the chapter a series of recommendations emerging from the research discussion is outlined. The scope of the recommendations includes proposals relating to tourists, business actors in the tourism value chain and households. Recommendations relating to twelve actors in the tourism value chain are categorized into five cohorts. In addition, recommendations resulting from the research relating to tourism and poverty alleviation strategies at a local and national level are put forward.

The limitations of this study are outlined and suggestions for areas of further research are put forward. The significance of this research and its contribution to knowledge is proposed in the context of (i) development of a comprehensive model for tourism value chain mapping, which encompasses poor households, different tourism segments and actors in the informal as well as formal labour markets and (ii) measuring the contribution of domestic tourists' expenditure to poor households' incomes. Finally, the chapter provides concluding remarks

based on this research as to the prospects of pro-poor tourism in the resort of Cox's Bazar.

7.2 Addressing the Research Questions

The seven research questions underpinning the research objectives outlined in chapter 1 are revisited and research findings relating to each question are put forward.

7.2.1 Research Question 1: Are there variations in the level of contributions to poor households' incomes from different segments of the tourism market in Cox's Bazar?

The research identified six categories of tourist within the tourism market in Cox's Bazar (chapter 5). For all categories of tourist, the impact of tourist expenditure on non-poor households is significantly greater than on poor households. The findings clearly demonstrate that there is a significant level of variation of contribution among the different types of tourists. The category of tourists with the highest level of contribution to poor households is day visit tourists. This tourist category has no expenditure on accommodation and consequently has a higher level of discretionary expenditure which is transmitted to actors in the tourism chain with higher levels of linkages. Many of these actors such as street food vendors operate in the informal economy and have a relatively high level of contribution to poor households. The two categories of tourist with the highest level of daily expenditure per person are conference tourists and NGO tourists. However, their rate of contribution to poor households' income is less than half that of the day visit tourist category. This reflects the high proportion of their expenditure which is allocated to hotels in the luxury category combined with low expenditure on other business actors in

the tourism value chain. The business tourism segment has a lower level of daily expenditure but a similar level of contribution to poor households due to relatively high level of linkages with a range of business actors. The largest market segment is holiday tourists and they demonstrate an average level of contribution to poor households. Their low level of spend on local transport limits their contribution to poor households' income.

A key finding in this research relates to a comparison between the impact of domestic and inbound tourism expenditure in relation to poor households' incomes. The findings indicate that although gross spending by international tourists is higher, the contribution to poor households from tourists of domestic and diaspora origin is significant. This finding reflects the literature (Jafari 1987; Ghimire 2001; Scheyvens 2007; Ihalanayake 2009; Rogerson and Letsie 2013; Winters et al. 2013; Helleiner 2014) which asserts that claims made for tourism's potential in terms of poverty alleviation can be applied to domestic tourism as much as to international tourism. The findings demonstrate that domestic tourists stay in the tourism destination for a longer duration and allocate a greater share of expenditure on locally owned hotels and guest houses rather than luxury hotels. This pattern of expenditure may result in a higher contribution to poor households due to the higher level of linkages of the smaller, locally owned accommodation providers.

Overall, based on the research findings outlined in chapters 5 and 6, it can be concluded that there are clear differences in patterns of expenditure by different types of tourists and consequently, there is evidence of variations in contributions to poor households' incomes from different segments of the tourism market in Cox's Bazar.

7.2.2 Research Question 2: To what extent are there variations in the level of direct and indirect contribution to poor households' incomes from tourism value chain actors in Cox's Bazar?

This research focused on tourists' expenditure and the contribution this spending makes to household incomes in Cox's Bazar and the proportion of that income that is transmitted to poor households. In aggregate, 51.6 per cent of tourist expenditure reaches local households as income and of that 4.8 per cent reaches poor households. Analysis of the combination of tourist spending of twelve actors categorized into five cohorts and each cohort's contribution to household income is used to address the extent to which there is variation in relation to contribution to poor households' incomes. The accommodation cohort incorporates hotels (0-star rating to 5-star rating hotels), guest houses and bed and breakfast providers. The second cohort is food and beverage which includes hotel food and beverage, restaurants, street food vendors and local food and beverage shops. The third group of business actors is combined under the heading of shopping and comprises dried fish retailers and handicrafts and souvenir retailers. The fourth group of business actors is made up of beach photographers, beach umbrella rentals and jeep tour providers (tours and beach activities). The final cohort is local transportation providers such as local tuk-tuk drivers and rickshaw pullers. An analysis of the contributions to poor households' income by the five cohorts of business actors in the tourism value chain is discussed in this section.

Accommodation: According to a study conducted by Mamun et al. (2013) there are a total of 220 hotels and guest houses within Cox's Bazar. The research findings demonstrate that 54.7 per cent of tourists' spending is on accommodation of which 62.2 per cent contributes to household incomes.

Therefore, this actor has a net contribution of 34 per cent. The poverty headcount ratio for the accommodation actor is very low at 1.6 per cent and this may be accounted for by high levels of local leakages and relatively low numbers of employees from poor households. The contribution to poor households' income through tourist spending on accommodation weighted by this actor's share of tourist spending is only 0.5 per cent. The majority of hotels have the capacity to generate more jobs locally during peak season and consequently contribution to household income may vary based on the seasonal nature of tourism in Cox's Bazar.

Food & Beverage: The findings (Chapter 5) indicate that 34.6 per cent of tourist spending goes to food and beverage of which 37.9 per cent reaches local households as income and the net contribution is therefore 13.1 per cent. This level of net contribution is low compared to accommodation. However, its contribution to poor households is much higher at 3.3 per cent compared to 0.5 per cent for accommodation and compared with other cohorts within the tourism value chain. It was observed during the fieldwork data collection stage that the majority of the street food vendors are women. Overall, the findings of this research have demonstrated a low level of opportunities for women to contribute to household's income and street food vending provides one of the few income generating opportunities for women.

Shopping: The shopping cohort of the tourism value chain in Cox's Bazar incorporates three segments – handicrafts and souvenir retail shops, handicrafts street vendors and dried fish retailers. Dried fish is a popular delicacy associated with Cox's Bazar and it has been included here as it is frequently purchased as a gift or souvenir by tourists. A detailed breakdown of data relating to the 3 components of the shopping cohort is presented in chapter

5. It can be seen that purchase of handicrafts comprises 3 per cent of tourists' expenditure and generates a 17.2 per cent contribution to the local household incomes. The total contribution to poor households' income is only 0.01 per cent because the cost of sales is more than 70 per cent for this sector. The findings show that the majority of cost of sales items are imported from countries such as China (78.1 per cent), Burma (11 per cent) and Thailand (2.3 per cent). The proportion of products sourced in Bangladesh was only 8.6 per cent. The high volume of imported products results in a low level of contribution to the incomes of poor households. Most of the retailers buy these products from third party suppliers in the Burmese market in Cox's Bazar and Dhaka.

The fish industry is an important part of the overall economy and the tourism economy in Cox's Bazar and purchases of fresh seafood and dried fish products (shukti) form an integral component of tourists' expenditure (Hossain et al. 2013; Bhattacharjee et al. 2018). A total of 18 per cent of households in Cox's Bazar depend on the fisheries sector for their livelihood. A total of 25-30 per cent of fish are dried from the fresh fish in Cox's Bazar. Ahsan et al. (2016) notes that there are a range of intermediaries directly and indirectly involved in the supply chain from the fresh fish selling stage to fish drying stage. The findings of the research indicate that the dried fish products account for 3.2 per cent of tourists' expenditure. The net contribution to the local households is 0.6 per cent and the contribution to the incomes of poor households is 0.1 per cent. The key reasons for this low level of contribution are high overheads and low profit margins. Although it constitutes a small proportion of income for poor households the dried fish sector has a significant impact on local livelihoods in Cox's Bazar in terms of employment.

Tours and Beach Activities: This cohort of the tourism value chain encompasses three groups of actors; beach umbrella rentals, beach photographers and jeep tour operators. There are 748 registered beach photographers from Laboni to Enani beach point in Cox's Bazar. Locals are directly and indirectly involved to this business which generates BD Tk. 1.5 million a day (Financial Express 2018). The research findings indicate that the net profit margin is nearly 55 per cent for this cohort. However, tourists' expenditure is only 1.9 per cent in this sector and margins are low. The level of gross contribution is 65 per cent which contributes to the local households. The contribution to incomes for poor households is 0.2 per cent. Challenges facing this sector are lack of funding for training facilities, difficulties in accessing loans or credit and the absence of coordinated marketing campaigns.

Local Transportation: Local transportation comprises only 2.6 per cent of tourists' spending and encompasses spending on tuk tuks and rickshaws. The rickshaw and tuk tuk drivers are also associated with supplies of provisions to local establishments such as hotels, restaurants and shops in Cox's Bazar. The level of contribution to poor households' income for this cohort is 0.4 per cent. The actors within this segment generate relatively high contributions to local households (72.2 per cent). Whilst this is significant, the net contribution is relatively small at 1.9 per cent due to tourists spending only 2.6 per cent of all outgoings on local transportation. More importantly the persons providing local transportation services come from mostly poor households. Rickshaw fares and tuk tuk fares account for 0.6 per cent and 0.8 (chapter 5) per cent of tourists' expenditure respectively. One factor associated with the low share of tourists' expenditure is that most tourists' accommodation is located within walking distance of the beaches. In addition, there is an oversupply of registered and

non-registered local transport providers and consequently the market is highly competitive, and this constrains the level of income. Overall, the findings of this research indicate significant variations in the level of direct and indirect contribution to poor households' incomes from tourism value chain actors in Cox's Bazar.

7.2.3 Research Question 3: To what extent is there evidence of linkages to the local economy by actors in the tourism value chain?

Advocates of pro-poor tourism cite the potential of the tourist industry to facilitate inter-sectoral linkages in the local business environment as one of its main strengths in terms of contributing to poverty reduction (Sharpley 2002; Sofield et al. 2004; Rogerson 2012). These linkages, it is argued are critical to distributing net benefits of tourism to local communities and poor households (Torres 2004). However, segments of the tourism value chain in developing countries are criticised for lack of linkages with local economies (Freitag 1994; Mbaiwa 2000; Mitchell and Ashley 2016). The accommodation sector and luxury hotels specifically have been identified as tending to have weak linkages with local supply chains and an over dependence on imports. The findings of this research are structured within the context of five cohorts of actors in the tourism value chain in Cox's Bazar and relate to the tourism value chain mapping framework constructed in chapter 5. The largest cohort in terms of the share of tourists' expenditure is the accommodation sector which has a major impact in terms of employment of local people and as a purchaser of goods and services. The findings demonstrate that in Cox's Bazar, the accommodation sector's strongest linkages are in relation to cleaning services. The hotels sector has strong linkages with local laundry services for cleaning of bedlinen, tableware and uniforms. However, overall, the accommodation sector

demonstrates a low level of linkages (9 per cent) with the local economy which is in line with research findings (Taylor et al.1991; Freitag 1994; Mbaiwa 2000) in other developing economies. The reasons put forward for this lack of linkages relates to customer demands and weaknesses in the local supply chain in terms of quality and reliability.

The food and beverage cohort (restaurants, local shops and street food vendors) has more than double the rate of linkages (21.8 per cent) compared with the accommodation sector. This is primarily based on restaurants' linkages (18.5 per cent) with food waste and recycling plants in Cox's Bazar and street food vendors' high levels of linkage (52.1 per cent) mainly due to their locally sourced food items. However, the beverage component of this cohort is required to source its product range of bottled water and soft drinks from other parts of Bangladesh.

The two components of the shopping cohort demonstrate variations in terms of linkages. The dried fish retail sector has the highest level of linkages (79.9 per cent) in the research sample because all cost of sales items is sourced directly from local people. The high level of linkages is supported by a strong local fish supply chain and a range of channels of distribution. By contrast the handicrafts retail sector accounts for the lowest level of linkages (8.5 per cent) due to dependence on imports. The local transportation has a high linkage rate (55.7 per cent) based on maintenance services provided by local small and medium sized enterprises. The tours and beach activities actor which attracts the lowest share of tourists' spend has relatively strong linkages (32.8 per cent) with the food sector based on purchase of consumables from restaurants and street food vendors. Overall, the findings of this research relating to Research Question 3 indicate that there are variations in the levels of linkages to the local

economy by actors in the tourism value chain. Sectors which attract high expenditure by tourists such as accommodation, food and souvenirs have a low level of linkages but areas of lower tourist expenditure such as street vendors, local transportation and the local excursions sector demonstrate a higher level of linkages.

7.2.4 Research Question 4: To what extent is there evidence of leakages from the local economy by actors in the tourism value chain?

The majority of literature on leakages is in the context of international tourism (Diaz 2001; Lejarraga and Walkenhorst 2010; Lange 2011). However, the tourism market in Cox's Bazar and in Bangladesh generally is largely based on domestic tourism (Amin 2017). The findings of this research indicate that overall, the rate of leakages due to imports is low. However, there is significant variation in the rates of leakages from the local economy in Cox's Bazar by the five cohorts of actors in the tourism value chain. The tourism value chain mapping framework developed in chapter 5 identifies and measures leakages relating to the actors in the research sample. The research findings demonstrate that the average rate of leakages for all the actors in the tourism value chain is 26.3 per cent although only a minor component (4 per cent) of this figure relates to imports. The accommodation cohort has a total leakage rate of 16.3 per cent which is below the average. The main contributory factors underpinning this leakage rate are guest room supplies. These products need to be sourced from other regions of Bangladesh as there is a lack of availability in the local supply chain. Quality of products and consumer demands for brands are other relevant factors. There is a very small level of imports (1.9 per cent) relating to uniforms and linens mainly in the high-end hotels.

There is some variation in the food and beverage cohort relating to leakage rates. Restaurant and street food vendors have leakage rates (32.1 per cent) slightly above the average rate, mainly because the major food distributors are located outside Cox's Bazar. However, a different pattern of leakages can be observed in the beverages sector where the total rate of leakages is 81.4 per cent which includes imports (11.1 per cent). The driver for this very high level of leakages is the limited beverage supply chain in Cox's Bazar region and the location of beverage distributors in other districts in Bangladesh. A similar pattern of variation may be observed in the shopping cohort. The dried fish retail sector demonstrates a low level of leakages (4.5 per cent) which relates to loan payments to financial institutions based outside Cox's Bazar. The handicrafts retail sector has a very high rate of leakages (73.2 per cent) which is almost three times the average for the research sample. This leakages rate comprises domestic leakages and imports. The import rate is the highest in the research sample (52 per cent) and is based on competitive prices from foreign suppliers and the weakness of the local supply chain. In addition, domestic tourists' consumption patterns are influenced by the higher quality and diversity of choice of foreign products.

The local transportation and the tour and beach activities sectors display similar patterns of relatively low levels of leakages. Both cohorts have leakage rates which are less than a third of the average for the research sample and do not include any imports. Leakages in the local transportation sector (8 per cent) relate primarily to purchase of batteries for electric vehicles which are manufactured and distributed in other parts of Bangladesh. Similarly, the tours and beach activities sector's low level of leakages (7.3 per cent) is mainly associated with fuel which is distributed from outside Cox's Bazar.

The findings of this research indicate that there is evidence of leakages in the tourism value chain. The literature (Chok et al. 2007; Lange 2011; Terzioglu and Gokovali, 2016) suggests that the hotel sector is normally associated with high levels of leakages. However, this assertion is not supported by this research as none of the hotels in Cox's Bazar are owned by foreign chains. Overall, the research findings demonstrate that although there are significant leakages (22.3 per cent) from the local economy to other regions of Bangladesh due to supply chain issues, the rate of leakages based on imports is only 4 per cent.

7.2.5 Research Question 5: To what extent do tourism related occupations contribute to poor households' income?

The scope of this research into poor households covers 28 occupations divided into two categories, (i) tourism related occupations and (ii) non-tourism related occupations. Findings related to the poverty headcount ratios (Non-poor ranked from 0 to 1 and poor ranked from 1 to up to highest score) demonstrate that the average poverty headcount ratio for all households in the sample is 0.36. The poverty headcount ratio for people working in the tourism related occupations is 0.37 while the ratio for people working in the non-tourism related occupations is 35. The findings of this research show that 11 occupations are identified in tourism related sector. The impact of tourism related occupations on households' poverty headcount varies based on the size of the households and the proportion of unemployed, children and retired persons in the households. The findings of this research indicate that out of 11 occupations related to the tourism sector, two types of occupations are classified as below the extreme poverty line based on World Bank Purchasing Power Parity (PPP). Taking into

account their household sizes the poverty threshold in terms of monthly income would be BD Tk. 9,916. The occupations with the highest level of poverty headcount ratio are seasonal workers such as street vendors, beach photographers and tea shop helpers. The average household size for seasonal workers is 5.3 and 6 for tea shop helpers. The average monthly income for these two occupations is BD Tk. 6,492 (chapter 6).

By contrast, three occupations in the non-tourism related category may be classified as below the extreme poverty line. Taking household sizes into account the poverty threshold based on World Bank PPP measure criteria is BD Tk. 10,103. The three highest level of poverty headcount occupations in the non-tourism related occupations are cleaners, fish cleaners and security guards where the poverty headcount is 1. The average size of the households for these three occupations is 5.4 and the average monthly income of BD Tk. 6,413 is only slightly lower than the tourism related occupations. Within the tourism related occupations, there is significant variation in relation to poverty headcount ratio. The households' sizes range from 3 to 5.3. Occupations such as rickshaw pullers, tuk tuk drivers, tea shop owners and restaurant workers have poverty headcount ratios in a range from 0.33 to 0.53 and the average household sizes range from 4 to 10. The 0 level of poverty headcount ratio occupations are dry fish sellers, jewelry sellers, street vendors and handicraft vendors and the average household sizes range from 3 to 5.3.

Overall, it can be concluded that the tourism related occupations make a meaningful contribution to poor households. 11 out of 28 occupations identified in the household research sample were occupations related to tourism. Out of this number only two occupations were below the poverty head count ratio. The findings of this research support literature (Ashley 2002; Bah and Goodwin

2003; Harrison 2008; Barthelmes 2015; Vargas, 2016) which emphasises the important role of employment in the informal economy in poverty alleviation in developing countries.

7.2.6 Research Question 6: How inclusive in terms of gender participation is the tourism value chain in Cox's Bazar?

Advocates of pro-poor tourism emphasis the link between women's participation in the tourism labour market and contributions from tourism to poor households' incomes (Ashley and Roe 2002). The findings of this research relate to the number of women employed in the tourism value chain and to gender-based differentials in terms of pay and employment conditions. In order to contextualise these findings it is first necessary to refer to the research findings related to households. In chapter 6, analysis was conducted relating to gender participation in employment in tourism related and non-tourism related occupations. Analysis of the fieldwork research with 127 households indicates the percentage of employed females in households engaged in tourism related occupations is 37.5 per cent. By contrast the female participation rate in non-tourism related occupations is only slightly lower (36 per cent). These levels of participation may vary in the peak tourism season as there is a higher level of tourism related employment. However, this research data does not indicate that tourism provides significantly higher levels of employment for women than other industries in Cox's Bazar. The accommodation sector in Cox's Bazar has a female labour market participation rate of 9.37 per cent. The food sector has an even smaller proportion of female staff with only 6.57 per cent female workers out of a total of 350 employees (chapter 5). In both the accommodation and food segments of the tourism value chain these jobs are concentrated in the less well-paid occupations such as cleaning rather than customer facing roles.

In the shopping cohort, there are generally low levels of female employment in both the dried fish sector and the handicrafts sector. In the dried fish sector, the female participation is 9.3 per cent and the rate for the handicrafts sector is 6.67 per cent. In addition, there is a lack of parity in terms of pay as male fish processors earn BD Tk. 600 per day person but women earn BD Tk. 300 for the same hours of work. The local transportation and tours and beaches activities cohorts in the research sample employed no female staff. Studies on gender and women's empowerment (Ashley and Roe 2002; Scheyvens 2007; Tucker and Boonabaana 2011; Ferguson 2015) note the importance of female employment in the tourism value chain if tourism is to be considered pro-poor. However, the findings of this research indicate low levels of female participation in the tourism labour market and significant gender differentials in pay and working terms of employment and indicate that the tourism value chain cannot be classified as inclusive in terms of gender participation.

7.2.7 Research Question 7: To what extent is the tourism value chain in Cox's Bazar pro-poor?

Tourism's potential to act as a catalyst for the provision of employment opportunities is a central principle supporting the concept of pro-poor tourism (Ashley and Roe 2002; Bah and Goodwin 2003; Harrison 2008 Jamieson et al.2004; Torres and Momsen 2004; Goodwin 2008; Mitchell and Ashley 2010; Mehrotra 2019). Claims made regarding the labour intensive nature of the tourism industry, opportunities for people with low skills levels and accessibility to poor people have been cited as factors which promote development of tourism strategies in many developing economies (Jamieson et al. 2004; UNWTO 2010). However, critics of the pro-poor tourism approach assert that the impact of tourism related jobs on poor households' incomes is limited due to

low levels of remuneration and lack of job security due to seasonality often associated with the tourism industry (Scheyvens 2011; Pleumarom 2012). In order to address this research question, it is necessary to examine the research findings based on the tourism value chain mapping incorporating contribution of value chain actors to poor households' incomes. From a solely monetary perspective this research indicates that tourism increases poor households' incomes and delivers benefits to the poor. However, an examination of the tourism value chain's pro-poor credentials requires a wider perspective (Ashley et al. 2001; Goodwin 2008; Mitchell and Ashley 2010).

Analysis of the income channel model discussed in Njoya and Seetaram (2018) provides a framework for measuring the impact of tourism spending on poor households. This channel comprises direct and indirect employment and opportunities for income generating activities in the tourism value chain and in the supply chain. The findings in this research demonstrate that almost 40 per cent of occupations in the research sample were directly related to employment in the tourism value chain. In relation to indirect employment tourism is identified as a sector which provide poor local residents with access to markets in which to sell their goods and services (Torres and Momsen 2004; Lemma 2014). An analysis of the cost of sales of five cohorts of tourism enterprises (chapter 5) indicates a relatively high level of expenditure on the local supply chain which employs a high number of poor people. Examples of tourism enterprises with strong local linkages which create employment for the poor include the restaurant sector which has the highest poverty headcount ratio. The dried fish sector and street food sectors demonstrate strong linkages with the local economy, thereby supporting employment for poor people in the local supply chain. Overall, the rate of linkages for the five cohorts in the sample are

accommodation (9 per cent), food and beverage (21.8 per cent), shopping (45.1 per cent), tours and beach activities (32.8 per cent) and local transportation (55.9 per cent). However, the handicrafts segment of the shopping cohort is highly dependent on imports and this denies opportunities for local poor people to provide goods. In addition, an analysis of the supply chain in Cox's Bazar (chapter 5) demonstrates the high level of intermediaries involved in supplying certain products and this can prevent poor people from directly benefiting from the supply of goods and services to tourism enterprises. The cohort which demonstrates the highest level of establishment of small tourism enterprises is the tours and beach activities sector. The small businesses associated with this sector are beach photographers and beach umbrella rentals operators. 36.36 per cent of the tourism related occupations identified in the research sample may be classified as micro businesses in the formal economy.

The findings of this research are consistent with the literature (Chen 2012; Losby et al. 2013; Vanek et al. 2014; Barthelmes 2015; Vargas, 2016) relating to participation in the informal economy by poor people in developing countries. The two actors in the sample with the highest level of participation in the informal economy were street food vendors (88.9 per cent) and handicrafts street vendors. It was noted during the field work that there is an increasing trend by tourism authorities in Cox's Bazar to reduce participation in the informal economy in the tourism value chain through requirements for business permits. Overall, the research findings indicate that in the context of income channels the tourism industry in Cox's Bazar has prospects of being pro-poor. The research findings demonstrate that the contribution from actors in the tourism value chain to poor households equates to 4.8 per cent, however, there is significant variation in the levels of contributions from different cohort of

actors based on levels of linkages and leakages. There is also variation within tourism related occupations in relation to contribution to poor household incomes. It can be noted that occupations in the informal sector such as street food vendors have a proportionately larger contribution to poor households than some larger formal actors such as the accommodation sector. Based on an analysis of income channels (Njoya and Seetaram 2018) this research indicates that the tourism value chain in Cox's Bazar may be categorised as pro-poor. There is evidence of economic benefits to poor households from participation in tourism related employment. The research findings also demonstrate that poor people are engaged in providing goods and services in the formal economy and to a lesser extent in the informal economy and are involved in small tourism enterprises. However, the findings also demonstrate that women are underrepresented in employment in the tourism value chain and receive lower levels of payments for equal work which has a negative impact on poverty reduction.

Tax revenue is also included as a channel by which tourism can affect poor households (Blake et al. 2008; Njoya and Seetaram 2018). The scope of this research did not include taxes on tourists; however, it did examine taxes on actors in the tourism value chain. All the actors in the research sample operating in the formal economy (with the exception of tuk tuk and rickshaw pullers) are obliged to pay VAT and income taxes. The average rate of VAT payable is 7.9 per cent and the average rate of income tax is 3.6 per cent. However, the range of VAT rates range from 2.9 per cent to 12.1 per cent. Overall, the findings of this research do not indicate that there was any redistribution of proceeds in terms of investment in the tourism infrastructure in Cox's Bazar. However, tax revenues contribute to the government of

Bangladesh's poverty alleviation strategies, specifically the social safety net programmes (SSNPs) outlined in chapter 3 (section 3.11.1). It can be argued that taxpayer funded social welfare programmes such as Ashrayan 2 (Poverty Alleviation and Rehabilitation) serve to redistribute proceeds from tourism related enterprises to the poorest households. Consequently, it can be concluded that taxes on tourism enterprises may be considered as pro-poor.

7.3 Recommendations

The following recommendations are based on the results of the value chain mapping conducted in chapter 5 and the analysis of contributions to poor households' incomes by six categories of tourists and five cohorts of business actors in the tourism value chain in chapter 6. These recommendations are presented in three sections relating to (i) tourists, (ii) tourism value chain actors, (iii) poor households. In addition, recommendations relating to strategic and governance issues (Goeldner and Ritchie 2009; Mitchell and Ashley 2010; Edgell and Swanson 2013) at local and national level are suggested.

7.4 Recommendations Relating to Tourists

The contribution of a tourism value chain to poor households' incomes largely relates to the level of tourists' expenditure on products and services with strong linkages to the local economy (UNCTAD 2013; Lemma 2018). Consequently, there are three options which may be undertaken in order to increase the tourist income (i) raising the numbers of tourists, (ii) increasing the expenditure per tourist in the local economy or (iii) extending the average length of stay. The results of the tourist demographic profile of the sample in this research outlined in chapter 5 demonstrate that the majority of tourists in Cox's Bazar are male (71.2 per cent) and 85.5 per cent are within the age range 18 to 44. It should be

noted that these figures may be skewed by the fact that the research was conducted in the off-peak season which attracts many male students due to lower hotel prices. However other research literature (Sultana 2008; Rahman and Shil 2012; Amin 2017) supports the findings in this study that the vast majority of tourists are males between the ages of 18 and 35. One recommendation emanating from this research is that Parjaton Corporation in Cox's Bazar target a more balanced demographic profile of tourists with an emphasis on families who typically spend more per head on sectors with high levels of local linkages such as food, transport, souvenirs and tours and beach activities. A strategy to target visitors from the high-end segment of the tourism market to the resort is also recommended in order to maximise revenue per visitor and contribution to poor households.

Another relatively untapped market relates to employees of the high number of NGO's located in the greater Cox's Bazar region. There are 144 international and Bangladeshi NGOs with offices located in Cox's Bazar town and the surrounding areas of Teknaf and Ukhiya and the humanitarian organisations have become a major influence on the local economy (Dhaka Tribune 2018). Analysis of the data collected in this research indicates that NGO staff, many of whom are day visitors to the beach areas have the highest daily expenditure of all tourists in the sample. There is the caveat that the sample size for this segment of the tourism market was small, however it is clear that there is a significant market in proximity to the resort. During the research there was no evidence of any campaigns or incentives to cater for the needs of this potentially large and lucrative tourist market segment. It is recommended that the Cox's Bazar Development Authority (COXDA) develop links with the NGO

sector in order to provide rest and recreation facilities for staff from aid organisations.

Retention of the current tourist market and encouragement of repeat holiday makers should also be prioritised as well as the promotion of value - added sales. However, there is a need to attract a new generation of tourists from the country's rapidly expanding middle class (Farzana 2014). As the economy in Bangladesh continues to grow, more domestic tourists are seeking leisure activities. Bangladesh is undergoing rapid social and economic change, but the model of its tourism offer at its major domestic resort has hardly changed in the past two decades (Siddique and Jamil 2013). In the course of this research, tourists expressed their views regarding areas for improvement in terms of their tourism experience at Cox's Bazar. A summary of this feedback may be found in appendix 20. Recommendations relating to actors in the tourism value chain are made later in this chapter. However overarching analysis of feedback from tourists reflects previous research (Amin 2017; Siddique and Jamil 2013) that there is a need for higher standards of professionalism at all stages of the tourism chain from travel booking to transportation, accommodation, food, excursions and purchases of souvenirs. In terms of pre arrival procedures for tourists, an overall lack of information provision and lack of transparency about pricing of coaches and hotels were cited by respondents as key barriers to booking a stay in Cox's Bazar. The unavailability of online platforms with social media integration to provide comprehensive tourist information and facilitate travel and accommodation bookings needs to be addressed. It is recommended that these developments should be explicitly incorporated within the context of the Government of Bangladesh's Digital Bangladesh Vision 2021 strategy (Chrol 2018).

However, an increase in numbers of tourists does not necessarily benefit poor households and it may instead lead to detrimental consequences (Christ et al. 2003; Chok and Macbeth 2007) relating to the environment and *over tourism* (Novelli 2015). In order to address this phenomenon, tourists to Cox's Bazar should be offered opportunities to purchase locally sourced products directly from local people such as regional food specialties, jewellery and handicrafts from indigenous communities. This research has demonstrated that relatively small levels of tourism expenditure on small and micro business actors can have a proportionally high impact on poor households. Changes in expenditure patterns by tourists with an increased targeting of spending on goods and services with strong local linkages to the local economy can enhance the net contribution to poor households' incomes.

7.5 Recommendations Relating to Business Actors

The data from this research demonstrates that although accommodation comprises the single largest proportion of tourists' expenditure, the contribution of this component of the tourism value chain to poor households is relatively low. Challenges facing the accommodation sector include high costs and unreliability of supply of utilities especially electricity. The accommodation sector's potential to make an increased contribution to poor households is constrained by the low levels of linkages with the local economy. There is previous research (Meyer 2007; Pillay and Rogerson 2013) about high levels of leakages relating to hotels and other accommodation providers which is reflected in the context of Cox's Bazar. The majority of hotels in the resort are small to medium-sized and owner managed. Many of the hoteliers have had no formal training in hospitality, business management or procurement methods. A

key reason cited by hotel owners for the low level of linkages is inconsistencies of local produce and weak supply chain links with local farmers and other suppliers of tourism related products. It is also evident that there is a high level of dependence on intermediary suppliers which may act as a barrier for some potential local suppliers and reduce the income to poor households. There are over 220 hotels in Cox's Bazar (Mamun et al. 2013), however there is little evidence of collaboration and cooperation between these small to medium size businesses in terms of sourcing local products at a competitive price. Meyer (2007) proposes a conceptual framework for the accommodation sector to enhance linkages with the local economy and poor households. It is recommended that the Ministry of Civil Aviation and Tourism (MOCAT) adopt this framework which promotes four types of linkages for the accommodation sector (i) in-house responsibilities (ii) supply chain linkages (iii) small micro and medium enterprises (SMME) development and outsourcing and (iv) community partnerships.

Food is an important part of Bangladeshi culture and this is reflected in the tourism industry. Recent research (Parvez and Kashem 2018) found that tasting the traditional food of a destination was a priority for 37 per cent of Bangladeshi tourists. Cox's Bazar and the surrounding areas are famous for seafood, dried fish (shutki) and other local delicacies including dishes from tribal communities and seafood and shellfish from the area are exported across the world. Expenditure on the food sector comprises the second largest component of tourist spending in this research. Significantly, this segment of the tourism value chain has the highest level of contribution to the income of poor households in the research sample. It is also a major employer in both the formal and informal sector. Given the high level of linkages to the local economy and positive

contribution to poor households, a recommendation is that Cox's Bazar should be promoted as a food tourism destination in order to increase local direct and indirect employment. A culinary tourism destination would incorporate food festivals and tours, visits to specialist primary food producers, specialist restaurants and food tasting (Buhalis and Costa 2006). Although the concept of food tourism is not widely known in Bangladesh, it has proven to be a successful niche segment in other South Asian destinations including Kerala, Thailand, Singapore and Vietnam (Yeoman and Mc Mahon Beattie 2016; Henderson 2019). However, in order to achieve this recommendation, it is necessary as evidenced by the tourist feedback cited in section 7.4 for the municipality in Cox's Bazar is to take steps to improve food safety standards and licensing of formal and informal food businesses.

The local transportation segment of the tourism value chain plays a key role not only in conveying tourists but only in transporting goods from producers and wholesalers in the supply chain. Wages in the sector are low and unstable for tuk tuk drivers and rickshaw pullers and the consequent contribution to poor households is low. This is despite the fact there are relatively strong links with supply chains in the local economy. Empirical evidence and feedback from tourists indicate that there is an oversupply of labour in this work resulting in high competition, traffic congestion and low fares. It is recommended that regulations are introduced limiting the number of vehicles operating at one time and introducing minimum fares to enhance income for poor households.

The tours and beach activities (including beach umbrella rentals, jeep tours and beach photographers) segment of the tourism value chain is dominated by self-employed operators in the formal and informal sectors. Levels of income fluctuate significantly and there are official and unofficial expenses such as

licenses to operate on beaches and payments to police. Net contributions to poor households from this sector are low. In order to address this situation, it is recommended that there are partnerships between hotels and tour companies and beach umbrella rentals to offer inclusive packages to guests. Training and investment are required to enable tour operators and photographers to offer more innovative products and services.

Research into tourist consumption behaviour indicates that authentic local handicrafts are an integral part of tourists' expenditure patterns (Markwick 2001; Mustafa 2011; Islam and Carlsen 2015). This was confirmed by this research which suggests that in an increasingly urbanised society, traditional handicrafts are prized by many Bangladeshi and foreign tourists. However, in Cox's Bazar the handicrafts sector is characterised by high imports, low levels of linkages with the local economy and negligible contribution to poor households' incomes. Imported handicrafts on sale are mass produced, low quality and lack any cultural connection with the region. Poor households particularly in the Rakhine ethnic minority community who have traditional skills in handicrafts are failing to benefit financially because of lack of entrepreneurial skills, design skills and promotion of their cultural products. This reflects the recommendation in the literature (Islam and Carlsen 2015) that collaboration is required between the Department of Cultural Affairs, Parjotan Corporation, NGOs and the private sector to promote and develop the craft sector and consequently benefit poor households.

7.6 Recommendations Relating to Poor Households in Cox's Bazar

This research indicates that those poor households which receive net benefits from tourism tend to be those directly or indirectly employed in the tourism value chain. During the field work research, it was evident that a significant proportion of respondents from poor households would like to access employment in the hospitality and tourism sector. However, there are economic and cultural barriers which prevent members of local poor households from working in the sector. Lack of education and training is cited by local people as one of the main barriers with high levels of illiteracy among adults. Hospitality and tourism related skills acquisition is essential if employment prospects are to be improved. In the accommodation and food segments of the tourism value chain, there is a demand for staff with appropriate skills. However, there is no dedicated hospitality or tourism training facility in Cox's Bazar. It is also noticeable that despite the ambitious plans for infrastructure development outlined in the National Tourism Plan (chapter 3) there are no specific plans for tourism related vocational training in the country's primary destination for domestic tourists.

Research conducted in other regions of Bangladesh (Farzana 2014; Amin 2017) notes that the key constraining factors for poor people to benefit from tourism through direct or indirect employment are lack of human capital (education and skills) and lack of financial capital. Multiple employment is a characteristic of the tourism industry in many developing economies (Cukier 2002). The phenomenon of occupational pluralism (Vaughan and Long 1982) where individuals are engaged in additional part-time or seasonal work related to tourism can contribute to poor households' incomes. However, poor people who aspire to create micro-enterprises related to tourism are handicapped by a

lack of training in basic entrepreneurial skills. Entrepreneurship training is required to help local people to develop businesses directly or indirectly linked to the tourism value chain. In addition, a lack of access to funding prevents them from investing in equipment or stock. Research (Faridul and Carlsen 2011) indicates that micro finance initiatives fail to provide loans which could enable poor households to develop income generating activities from tourism related enterprises. It is recommended that micro finance institutions provide loans related to the hospitality and tourism industry.

7.7 Recommendations Relating to Tourism Strategy for Bangladesh

Pro-poor tourism is based on the concept of interventions at a local level to ensure that poor households benefit from the tourism value chain (Ashley 2001; Goodwin 2008; Mitchell 2012). However, tourism policy at the national or regional level impacts the workings of the tourism value chain at the local level in areas such as infrastructure investment, employment, taxation, marketing and sustainability (Goeldner and Ritchie 2009; Edgell and Swanson 2013). Consequently, it is argued that any research into the tourism value chain needs to incorporate analysis of governance issues (Mitchell and Ashley 2010). Tourism is an industry with a complex supply chain and a wide range of suppliers. At a strategic level it also encompasses many stakeholders including government agencies, local authorities and trade bodies. The diverse range of official and private sector led organisations involved in the governance structure for tourism in Cox's Bazar is incorporated in the tourism value chain conceptual framework (section 5.16.1) and discussed further in chapter 3. However, during the field research for this study there was little evidence of collaboration and joint working between these stakeholders.

The absence of collaboration at local level in Cox's Bazar is to some extent reflected at national level in relation to coordination of tourism and poverty alleviation strategic planning (Hassan and Kokkranikal 2018). As outlined in chapter 3, tourism is officially identified in national planning documents by the government of Bangladesh as a 'thrust sector' with potential to facilitate economic growth. It has also been identified as one of the industries with potential to contribute to poverty alleviation. However, there appears to be a lack of synergy between these two strategic aims. If a pro-poor tourism approach is to be embedded, it needs to be underpinned by the principle of benefits to the poor. However, this not explicit in tourism planning strategies. Tourism is referenced as one of the drivers of economic growth in the Poverty Reduction Strategy Paper (PRSP). However, there is no explicit connection outlined between tourism and poverty reduction (Rahman 2010). An opinion piece by a national newspaper (Dhaka Tribune 2019) calling for an independent Ministry for Tourism as distinct from the current joint portfolio of the Ministry of Civil Aviation and Tourism (MOCAT) is a recommendation which merits consideration.

Research indicates that effective tourism planning in developing countries is facilitated by community consultation (Mitchell and Reid 2001; Tosun 2006). One of the ten principles for pursuing poverty alleviation through tourism (UNTWO and SNV 2010) stipulates that planning and development of tourism should be inclusive of a wide range of stakeholders and include participation and representation from poor communities. However, during field research there was no evidence that local businesses or residents had been consulted by any government body on tourism policies in Cox's Bazar.

Effective policy development also requires research underpinned by reliable data. Obtaining detailed data with reference to the relationship between the poverty alleviation and tourism nexus is problematic throughout South Asia due to its limitations (Lemma 2018). There is a need for research in order to conduct needs analyses in different sectors of the tourism industry and to produce evidence-led policies (Fayos-Solá, 1996). In Bangladesh lack of reliable comprehensive data is cited as an impediment to the research and development of meaningful tourism policies (Hassan and Kokkranikal 2018). This researcher found the lack of availability of reliable data relating to tourism and poverty to be a major constraint in research. A range of NGO's are working in the greater Cox's Bazar area, however there was no information that any are specifically engaged in tourism-based projects to alleviate poverty. Given the rapid growth of the domestic tourism market, it is recommended that a research consortium is established with input from university academics, government agencies, NGOs, private sector stakeholders and trade bodies. A central remit of such a research group would be a focus on provision of transparent data relating to the contribution of tourism to poor households' incomes.

7.8 Research Limitations

This research encompassed tourists, households and 12 business actors in the tourism value chain in the most popular tourism resort in Bangladesh. However, it is necessary to outline the limitations of this research. In relation to methodology, it is recognised that poverty is a multi-dimensional concept. Quantitative methodology is based on gathering and analysis of data and does not incorporate respondents' opinions and perceptions (Kumar 2014). Due to work and study commitments field research was conducted during the off-peak

season and data relating to revenue and income may differ in the peak tourist season. Time constraints and the off-peak season timing of the research contributed to the limited sample sizes. Access to reliable secondary data relating to poverty baselines and mapping of tourism businesses in Cox's Bazar was limited. Some of the business actors in the research sample did not maintain any computerised records of income and expenditure transactions which prevented the collection of some primary data. In addition, many businesses actors in the accommodation and food segments of the tourism value chain were reluctant to disclose information regarding income and expenditure (Rahman 2010). Finally, this research was conducted in the three most popular tourist beaches in Cox's Bazar and in 12 surrounding villages. The research findings reflect the sample in the study and as a consequence they cannot be extrapolated on a wider geographical level.

7.9 Suggestions for Further Research

It is proposed that a key area for research relates to the impact of domestic tourism in developing countries. Gladstone (2005) notes that for many academic researchers in the global North, domestic tourists in low-income countries are not recognised as tourists. Consequently, there is a need for wider research into different typologies of tourists in developing countries and analysis of the different levels of impact of their spending on poor households' incomes. A related field of further research is proposed in relation to the expenditure patterns of diaspora tourists who constitute a significant proportion of tourist numbers in south Asian countries such as Bangladesh and analysis of their contribution to poverty reduction. This research has also highlighted the need for greater research into the informal tourism economy in terms of its integration into the tourism value chain and its impact on poverty reduction.

Bangladesh is a country undergoing profound economic and social change. It has experienced a prolonged period of economic growth and has also made significant progress in relation to poverty reduction (chapter 3). If current trends continue. Tourism has also followed a growth trajectory from a figure of 300,000 domestic tourists in 2000 to 7 Million in 2017 (Economist 2018). Against this backdrop of rapid change, this research focused on the most popular tourism resort in the country and aimed to analyse the tourism value chain and its contribution to poor households' incomes. The scope of the research findings incorporated a wide range of issues relating to gender, policy development, education and training and entrepreneurship. It is proposed that research employing the tourism value chain mapping framework in this research is applied in other tourism destinations in Bangladesh in order to develop a body of quantitative research findings relating to the impact of tourism expenditure on poverty headcount ratio.

Suggestions for further research relating to the tourism and poverty nexus in Bangladesh are listed below.

- Analysis of feasibility of market segmentation strategies in tourism development in Cox's Bazar.
- Needs analysis relating to the development of human capital for poor communities to access employment opportunities in the tourism value chain.
- Analysis of gender differentials in employment and entrepreneurship in the tourism value chain and the impact of poor households' incomes
- Analysis of incidence of poverty among sub-groups of the poor (minority communities, indigenous communities) and their level of participation in the tourism value chain

- A review of incorporation of pro-poor tourism principles into tourism development and strategic planning at local and national level
- Quantitative research into comparative levels of linkages and leakages in the formal and informal segments of the tourism value chain.

7.10 Contribution to Knowledge

Significant claims have been made for the impact of tourism on poverty reduction. Understanding the tourism poverty link is crucial if tourism is to be used as a mechanism for reducing poverty (Winters et al. 2013). It is stated by its advocates that pro-poor tourism is not a theory in itself (Harrison 2008) and that it lacks an explicit theoretical basis (Mitchell 2019). This lack of conceptual underpinning is the subject of criticism in the literature (Scheyvens 2007; Schilcher 2007; Harrison 2008). However, in order to examine the concept of pro-poor tourism, it has been necessary to address concepts relating to the nature of tourism and the meaning of poverty. This research reflects literature that tourism has the capacity to generate pro-poor income. In that context, the findings of this research support the proposition that tourism is pro-poor in delivering 'net benefits to the poor'. However, the researcher acknowledges that if tourism is to be considered a tool for poverty alleviation, it is necessary to recognise the multidimensional nature of poverty (Scheyvens and Hughes 2019). Research (Mahadevan and Suardi 2017; Njoya and Seetaram 2018) demonstrates that tourism can improve the income of poor households but not reduce the overall number of poor people or lead to a reduction in income inequality. The approach undertaken in this research reflects literature (Leiper 1995; Mill and Morrison 2001; Sofield et al. 2001; Gunn and Var 2002; Liu 2003) relating to analyzing the specific characteristics of tourism through the

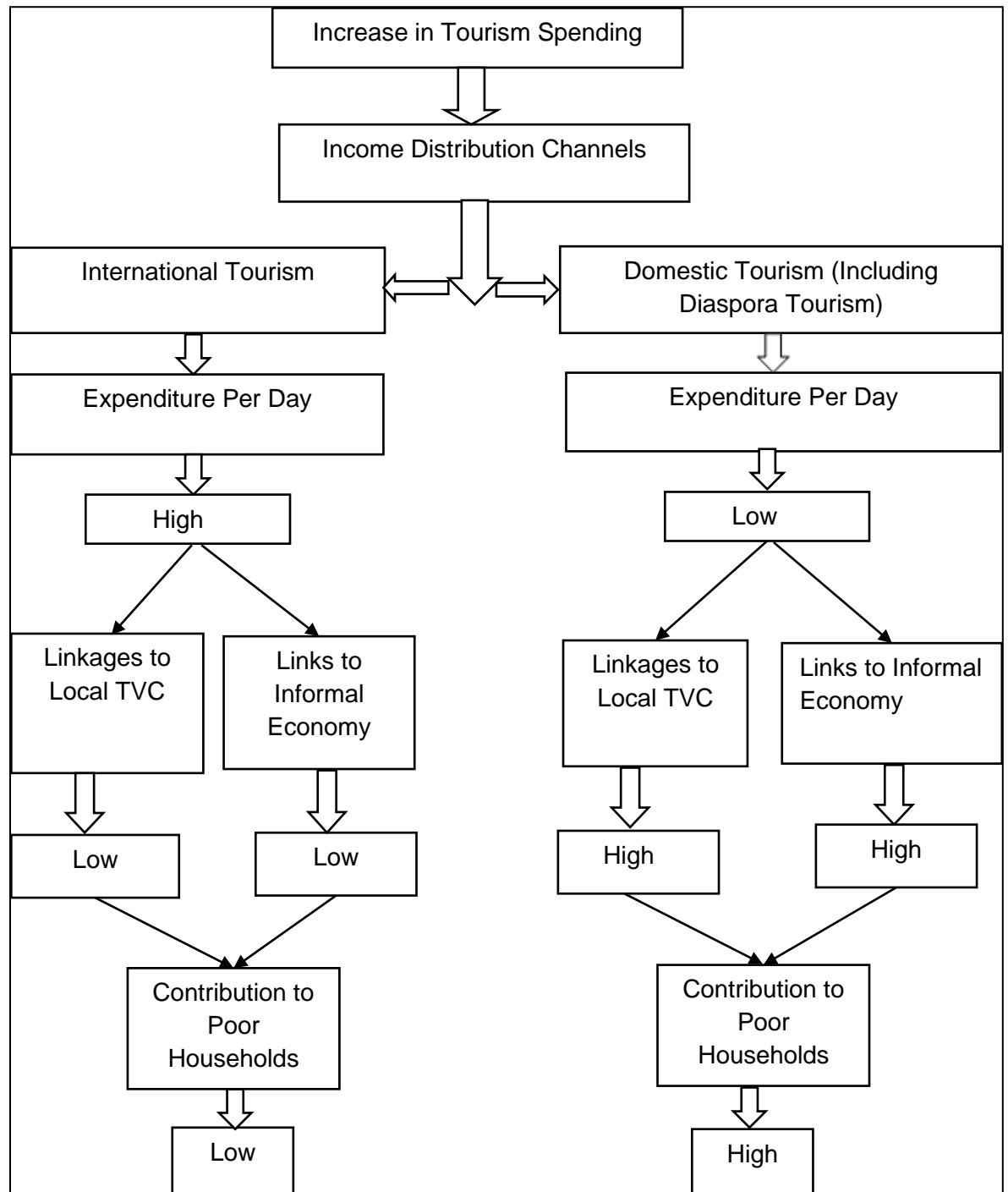
prism of a systems approach. Such an approach enables the researcher to examine backward and forward linkages among a comprehensive range of actors in a complex tourism value chain which extends beyond the traditional accommodation and agricultural sectors. It also facilitates the inclusion of the informal labour market which has a significant impact on poor households' incomes (Sethuraman 1981; Dao Truing 2014; Bathelmes 2015; Vargas 2016).

Tourism value chain mapping is the research method most closely associated with pro-poor tourism (Bolwig et al. 2010; Hoermann et al. 2010; Rogerson and Visser 2011, Ndivo and Cantoni 2015; Spenceley and Meyer 2016) and provides empirical evidence which aims to facilitate the transition of research in this field from a series of case studies to an emerging body of knowledge (Mitchell 2019). There is research into the potential of tourism to alleviate poverty in developing countries using value chain analysis (Mitchell and Phuc 2007; Mitchell and Faal 2008; Hussain et al. 2012; SNV 2012; Nguni and Jani 2016). Value chain analysis has been applied to the tourism industry in Asia (Halim 2014; Mao 2015) in Malaysia and Cambodia. However, most research has focused on either a specific component or a limited number of components (e.g., accommodation or agricultural suppliers) of the tourism value chain (Pillay and Rogerson 2013; Adiyia and Vanneste 2018; Yu et al. 2019). There has been no research conducted specifically using value chain analysis on the tourism industry in Cox's Bazar incorporating tourists, business actors and households. This research contributes to the existing body of knowledge on pro-poor tourism by analysing the contribution of (i) different types of tourists and (ii) 12 business actors to poor households' incomes. In addition, this research contains poverty head count ratio data relating to (i) occupations (ii) households employed in tourism sector and non-tourism sector (iii) ethnicity of households

and (iv) villages. This research proposes a tourism value chain mapping model (see chapter 5) which integrates poor households and incorporates different tourism segments and actors in the informal as well as formal labour markets.

A further contribution of this research relates to the impact of domestic tourism on poverty reduction. The majority of tourists involved in this research are domestic tourists and this rapidly growing segment of the tourist market in Bangladesh has not been studied extensively. The review of literature conducted in chapter 2 indicated that research into the impact of domestic tourism in developing countries has largely been neglected (Gladstone, 2005; Ghimire 2001; Scheyvens 2002; Mejia and Brandt; 2015; Singh and Krakover 2018). The results of the research in this paper supports Rodriguez et al.'s (2018) hypothesis that inbound tourism and domestic tourism have characteristics that can differently impact on poverty headcount ratios. An outcome of this thesis is a modification of the income channel model included in Njoya and Seetaram's (2018) research. Figure 7.1 illustrates this modification which integrates Gladstone's (2005) four-part typology of tourism in the Global South by examining different impacts on poverty of income channels from domestic and international tourists and linkages to local formal and informal tourism value chains.

Figure 7. 1: Impact of Tourists' Expenditure on Poor Households' Income



Source: Author's own work 2020

Overall, the thesis contributes to knowledge about the use of value chain analysis as a means of measurement of the impact of tourists' expenditure on poor households' income. It makes a contribution to knowledge relating to the impact of domestic tourism on poverty headcount in a developing economy.

Recommendations resulting from the research relating to the development of tourism and poverty alleviation strategies at a local and national level are also contained in this research. Finally, this research contributes to literature on the prospects of the implementation of pro-poor tourism in Cox's Bazar, Bangladesh.

7.11 Final Remarks

The aim of this research was to measure the contribution of tourists' expenditure to poor households' incomes and to assess the prospects of pro-poor tourism in Cox's Bazar. The resort of Cox's Bazar presents an interesting location in which to conduct research to examine the potential for tourism to contribute to poverty alleviation. Tourism in Cox's Bazar has some specific characteristics which differentiate it from other destinations used as research locations in literature. Firstly, Cox's Bazar and the Bangladesh tourism industry overall is overwhelmingly dependent on domestic tourists. Research into the role of domestic and diaspora tourism in developing countries is very limited (Jafari 1987; Ghimire 2001; Scheyvens 2007). However, the literature (Scheyvens 2007) stresses the tendency of domestic tourists to spend a proportionately higher amount of expenditure in small, local enterprises which have strong linkages to the local economy. Consequently, domestic and diaspora tourism has the potential to contribute to poor households' income and poverty alleviation. Many of the claims put forward relating to the tourism industry's capability for contributing to poverty reduction through employment for poor people (especially women), development of small enterprises and net contributions to poor households apply equally to domestic tourism (Scheyvens 2007). Despite this potential, tourism strategies in Bangladesh, as in many other

developing countries focus on attracting international tourists and ignore the domestic market.

The second feature of the Cox's Bazar tourism value chain is the very low level of foreign ownership of tourism assets. The vast majority of hotels and restaurants in Cox's Bazar are owned by Bangladeshis. Consequently, many of the references in the literature relating to repatriation of profits abroad do not apply in the context of the Cox's Bazar. This relative absence of leakages of profits abroad should enhance the prospect of pro-poor tourism in Cox's Bazar. This research has demonstrated the effectiveness of a value chain analysis approach as a research method. Value chains do not exist as a tangible reality however, they provide a framework for mapping the complex value chains associated with tourism and identifying linkages and leakages (Mitchell 2019). This research has evidenced that a mapping framework is an effective approach because it can track tourists' expenditure throughout the tourism value chain to poor households.

This research has also recognised the importance of incorporating analysis of the gender dimension of the tourism poverty nexus. Pro-poor tourism literature (Ashley and Roe 2002; Roe et al. 2004) emphasises the potential for tourism employment to be inclusive of women and thereby to contribute to poverty reduction. However, in the context of Cox's Bazar the findings of this research suggest that the lack of female participation in employment in the tourism value chain obstructs prospects for pro-poor tourism. The results of this paper are consistent with literature (Lemma 2014) which shows that female workers in tourism are disproportionately represented in low status and lower paid areas of work.

This research is based on a monetary based definition of poverty and understanding of the concept of the term 'pro-poor'. Within that context, it can be argued that the tourism value chain in Cox's Bazar is pro-poor in that it contributes to poor households' incomes. However, it is recognised that the concept of pro-poor tourism incorporates a multidimensional definition of the nature of poverty (Sen 1999; Truong 2014; Mitchell 2019). This wider definition of pro-poor tourism includes socio-cultural and political dimensions relating to vulnerability, isolation, powerlessness, dignity and self-respect and access to services such as education or healthcare (Chambers 2002; Sultana 2002; Zhao and Ritchie 2008). This research concludes that although the tourism value chain in Cox's Bazar has the potential to be pro-poor, it has some way to go before it meets the criteria specified in the wider definition of pro-poor tourism as set out by UNWTO (2010). Overall, there is a relatively low level of awareness in Bangladesh about the concept of pro-poor tourism within government, academia and other stakeholders. It is hoped that this research will contribute to the development of knowledge in this field for the benefit of poor households.

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LIST OF APPENDICES:

Appendix 1: Letter for Tourists' Actors and Households in Cox's Bazar



Faculty of Management

FAO: Cox's Bazar Tourist Police, Laboni Beach Road, Cox's Bazar, Bangladesh.

Dear Sir/Madam

I am writing as a Professor at Bournemouth University in the UK to confirm that one of our PhD students, [Thomas] Babul Gomes, is currently in Bangladesh undertaking research that is fundamental to his progress towards obtaining a PhD Doctorate.

His research involves interviewing actors in the tourism value chain to determine how they obtain their income, to evaluate the effects of tourism in reducing poverty levels and contributing to destination development. This includes interviews with tourists, households, and businesses.

Yours Faithfully,

A handwritten signature in blue ink, appearing to read 'Adam Blake'.

Adam Blake,

Professor of Economics,

Department of Tourism and Hospitality,

Faculty of Management,

Bournemouth University.

ablake@bournemouth.ac.uk

Appendix 2: Letter for Tourists Arrival and Departure in Bangladesh



Faculty of Management

FAO: Head of the Department, Immigration Bangladesh Police, Dhaka, Bangladesh.

Dear Sir/Madam

I am writing as a Professor at Bournemouth University in the UK to confirm that one of our PhD students, [Thomas] Babul Gomes, is currently in Bangladesh undertaking research that is fundamental to his progress towards obtaining a PhD Doctorate.

His research involves interviewing actors in the tourism value chain to determine how they obtain their income, to evaluate the effects of tourism in reducing poverty levels and contributing to destination development. This includes interviews with tourists, households, and businesses.

Yours Faithfully,

A handwritten signature in blue ink, appearing to read 'Adam Blake'.

Adam Blake,
Professor of Economics,
Department of Tourism and Hospitality,
Faculty of Management,
Bournemouth University.
ablake@bournemouth.ac.uk

Appendix 3: Letter for Tourists Arrival and Departure in Cox's Bazar



Faculty of Management

FAO: Cox's Bazar Tourist Police, Laboni Beach Road, Cox's Bazar, Bangladesh.

Dear Sir/Madam

I am writing as a Professor at Bournemouth University in the UK to confirm that one of our PhD students, [Thomas] Babul Gomes, is currently in Bangladesh undertaking research that is fundamental to his progress towards obtaining a PhD Doctorate.

His research involves interviewing actors in the tourism value chain to determine how they obtain their income, to evaluate the effects of tourism in reducing poverty levels and contributing to destination development. This includes interviews with tourists, households, and businesses.

Yours Faithfully,

A handwritten signature in blue ink, appearing to read 'Adam Blake'.

Adam Blake,

Professor of Economics,

Department of Tourism and Hospitality,

Faculty of Management,

Bournemouth University.

ablake@bournemouth.ac.uk

Appendix 4: A Permission Letter to Cox's Bazar Municipality



**Bournemouth
University**

Faculty of Management

FAO: Head of the Department, Cox's Bazar Municipality Office, East Court Hill Road, Cox's Bazar, Bangladesh.

Dear Sir/Madam

I am writing as a Professor at Bournemouth University in the UK to confirm that one of our PhD students, [Thomas] Babul Gomes, is currently in Bangladesh undertaking research that is fundamental to his progress towards obtaining a PhD Doctorate.

His research involves interviewing actors in the tourism value chain to determine how they obtain their income, to evaluate the effects of tourism in reducing poverty levels and contributing to destination development. This includes interviews with tourists, households, and businesses.

Yours Faithfully,

Adam Blake,

Professor of Economics,

Department of Tourism and Hospitality,

Faculty of Management,

Bournemouth University.

ablake@bournemouth.ac.uk

Appendix 5: A Structured Questionnaire: Tourists



Tourists Questionnaire Number#

Title: The Tourism Value Chain and the Prospect of Pro-Poor Tourism in Cox's Bazar, Bangladesh

Contact Person: Thomas Gomes (01638834652) bgomes@bournemouth.ac.uk

We would like to request your participation in a questionnaire. The purpose of this questionnaire is to analyse the tourists' contribution to local communities. Specifically, we focus on tourists' expenditure and contribution to poor household in Cox's Bazar.

Thank you very much for your support.

Name of Interviewee/s:

Country of Residence:

Date:

| |
|--|
| |
| |
| |

PART-A: SOCIO DEMOGRAPHIC PROFILE

1. Gender

☐ Male ☐ Female

2. Age

☐ 18-25 ☐ 26-35 ☐ 45 ☐ 46 ☐ 56 + ☐

3. Educational Level

☐ No formal education ☐ Primary school
☐ Secondary school ☐ Higher Degree
☐ (College/University)

4. Occupation

| | |
|---|---|
| <input type="checkbox"/> Own Business | <input type="checkbox"/> Part time employment (Private) |
| <input type="checkbox"/> Full time employment (Private) | <input type="checkbox"/> Part time employment (Public) |
| <input type="checkbox"/> Full time employment (Public) | <input type="checkbox"/> Student |
| <input type="checkbox"/> Unemployed | <input type="checkbox"/> Self-employed |
| <input type="checkbox"/> Other | |

PART-B: PURPOSE OF VISIT

5. The primary purpose of the visit?

☐ Study ☐ Holiday ☐ Visiting Friends and relatives
☐ Business
☐ Conference / seminars ☐ NGO/International organisation
☐ Other _____

6. Type of tourists:
☐ Foreigner ☐ Local (From Cox's Bazar) ☐ Local (from outside of Cox's Bazar)..... ☐ Abroad Residence, Country..... ☐ NGO's, Country..... ☐ Day Visit
☐ Others
7. Duration of stay?
☐ 1-3 days ☐ 4-7 days ☐ 8-15 days ☐ 16-30 days
☐ 1 Month+
8. Number of people you are travelling with or number of travel companions.
9. Type of accommodation?
☐ Hotels* ☐ Motels ☐ Hostels ☐ Friends & family house
☐ Paying guest/host family ☐ AirBnB ☐ Rented Apartment
☐ Guest House ☐ Other _____
10. Is your visit part of organised tour?
☐ Yes ☐ No
 If yes, name of the travel agency / tour operator _____
11. Where did you book your tour package?
☐ Bangladesh ☐ Cox's Bazar ☐ Outside of Bangladesh (Please Specify) _____
12. What are the facilities included in your tour package?
☐ All-inclusive ☐ Accommodation on ☐ Bed & Breakfast
☐ Accommodation and Excursion ☐ Others _____

PART-C: TOURISTS EXPENDITURE

13. What is the expenditure by you?

| Areas of expenditure | BD Taka/US Dollar (Day/Week/Month) | BD Taka (Total) |
|------------------------------|---------------------------------------|--------------------|
| Planning and Arrival | | |
| Tour Operators/Travel Agents | | |
| Airline | | |
| Ferry Operator | | |
| Inter City Coach | | |
| Other | | |
| Accommodation | | |
| Hotels* | | |
| Motel | | |
| Hostels | | |
| Friends & Family | | |
| Paying guest and host family | | |
| Rented Apartment | | |

| | | |
|---|--|--|
| AirBnB | | |
| Guest House | | |
| Other | | |
| Transportation (Local) | | |
| Taxi | | |
| Tuk Tuk | | |
| Rikshaw | | |
| Local Buses | | |
| Food | | |
| Restaurant | | |
| Hotel Restaurant | | |
| Street Food Vendors | | |
| Fast Food | | |
| Tea Shops | | |
| Groceries | | |
| Fruits | | |
| Vegetables | | |
| Tea | | |
| Water | | |
| Souvenir / Handicrafts/ Shopping | | |
| Textile Based Handicrafts | | |
| Dry Fish | | |
| Jewellery Based Handicrafts | | |
| Bamboo & Woodwork Based Handicrafts | | |
| Shells Based Handicrafts | | |
| Ceramic Based Handicrafts | | |
| Others | | |
| Tours and Beach Activities | | |
| Pre-Booked Tour (Hotels/Travel Agents) | | |
| Informal Tour Guide | | |
| Bus Tour | | |
| Rikshaw Tour | | |
| Walking Tour | | |
| Temple Tour | | |
| Boat Tour | | |
| Other | | |

14. How much have you paid for your package?

| Packages (Inclusive) | BD Taka/US Dollar | Length of stay |
|----------------------|-------------------|----------------|
| | | |

Appendix 6: A Structured Questionnaire: Accommodation



Questionnaire Number#

Title: The Tourism Value Chain and the Prospect of Pro-Poor Tourism in Cox's Bazar, Bangladesh

Contact Person: Thomas Gomes (01638834652) bgomes@bournemouth.ac.uk

We would like to request your participation in a questionnaire. The purpose of this questionnaire is to analyse the contribution to local communities and specifically the relationship between tourism and poverty alleviation in Cox's Bazar.

Thank you very much for your support.

Name of Interviewee/s:

Designation:

Organization/Address:

Date:

| |
|--|
| |
| |
| |
| |

1. Details for Year 2017:

| | | | |
|-------------------------------------|--------------------------------------|----------------------------------|---------------------------------|
| <input type="checkbox"/> Last Year | <input type="checkbox"/> Approximate | Link to Restaurant Questionnaire | <input type="text" value="R/"/> |
| <input type="checkbox"/> Last Month | <input type="checkbox"/> Accurate | | |
| <input type="checkbox"/> Last Week | <input type="checkbox"/> Accounts | | |

Others: _____

2. Hotel details:

| Last year / Monthly/Weekly Figures | | | | | | |
|------------------------------------|-------------|----------|---------|------------|------------------|-----------------------|
| Hotel/Guest House/B &B/Air | Star Qualit | No. Room | No. Bed | Lengt h of | Room occupa ncy% | No. Of Staff- (Male / |
| | | | | | | |

3. Revenue:

| Last year / | Total Revenue: (BD | % of total revenue |
|------------------|--------------------|--------------------|
| Room revenue | | |
| Food & beverages | | |
| Other Services | | |
| Other | | |

4. Cost Structure of Hotel Operations: (BD Taka)

| <input type="text"/> Financial <input type="text"/> Percentage | Expenditure | % of good by value from: | | | Details / notes (supplier names if in Cox's Bazar) |
|---|-------------|--------------------------|------------|-----------|---|
| | | Cox's Bazar | Bangladesh | Elsewhere | |
| Staff Costs | | | | | |
| Food | | | | | |
| Beverages | | | | | |
| Linens | | | | | |
| Cleaning Products | | | | | |
| Appliances for Guest Rooms | | | | | |
| Guest Room Supplies | | | | | |
| Uniforms | | | | | |
| Office | | | | | |
| Pool Supplies | | | | | |
| Others | | | | | |
| Guest Room Other Goods | | | | | |
| Services | | | | | |
| Electricity | | | | | |
| Gas | | | | | |
| Water | | | | | |
| Sewerage | | | | | |
| Laundry | | | | | |
| Car services | | | | | |
| Bus/minibus | | | | | |
| Others | | | | | |

Appendix 7: A Structured Questionnaire: Restaurants



Questionnaire Number#

Title: The Tourism Value Chain and the Prospect of Pro-Poor Tourism in Cox's Bazar, Bangladesh

Contact Person: Thomas Gomes (01638834652) bgomes@bournemouth.ac.uk

We would like to request your participation in a questionnaire. The purpose of this questionnaire is to analyse the contribution to local communities and specifically the relationship between tourism and poverty alleviation in Cox's Bazar.

Thank you very much for your support.

Name of Interviewee/s:

Designation:

Organization/Address:

Date:

| |
|--|
| |
| |
| |
| |

1. Details for Year 2017:

☐

Last Year

☐

Approximate

Link to Hotel
Questionnaire

H/

☐

Last

☐

Accurate

Month

☐

Last Week

☐

Accounts

Others

2. Restaurant details:

| Last year / Monthly/Weekly Figures | | | | |
|------------------------------------|---------------------|----------------------------------|-----------------------------|------------------------------|
| Fine Dining/Fast | No. of seats/Covers | No. Of Employees (Male / Female) | Ownership of the Restaurant | Customers Type-Local/Foreign |
| | | | | |

3. Revenue:

| Last year / | Total Revenue: (BD | % of total revenue |
|---------------------------|--------------------|--------------------|
| Food | | |
| Beverages | | |
| Home Delivery / Take away | | |
| Others | | |

4. Cost Structure of Restaurant Operations: (BD Taka)

| <input type="checkbox"/> Financial <input type="checkbox"/> Percentage | Expenditure | % of good by value from: | | | Details / notes |
|---|-------------|--------------------------|------------|-----------|-----------------|
| | | Cox's Bazar | Bangladesh | Elsewhere | |
| Staff Costs | | | | | |
| Food | | | | | |
| Rice | | | | | |
| Dry Food (Pasta, Meat | | | | | |
| Fish (Sea/Local Fish) | | | | | |
| Vegetables | | | | | |
| Dairy and Eggs | | | | | |
| Fruit | | | | | |
| Others | | | | | |
| Drinks | | | | | |
| Tea | | | | | |
| Coffee | | | | | |
| Water | | | | | |
| Juice | | | | | |
| Others | | | | | |
| Kitchen | | | | | |
| Small Appliances | | | | | |
| Pots and Pans | | | | | |
| Kitchen Tools | | | | | |
| Cleaning | | | | | |
| Uniforms | | | | | |
| Furniture | | | | | |
| Dishes and | | | | | |
| Cleaning | | | | | |
| Services | | | | | |
| Electricity | | | | | |
| Gas | | | | | |
| Water | | | | | |
| Sewerage | | | | | |
| Others | | | | | |

Appendix 8: A Structured Questionnaire: Suppliers



Questionnaire Number#

Title: The Tourism Value Chain and the Prospect of Pro-Poor Tourism in Cox's Bazar, Bangladesh

Contact Person: Thomas Gomes (01638834652) bgomes@bournemouth.ac.uk

We would like to request your participation in a questionnaire. The purpose of this questionnaire is to analyse the contribution to local communities and specifically the relationship between tourism and poverty alleviation in Cox's Bazar.

Thank you very much for your support.

Name of Interviewee/s:

Designation:

Organization/Address:

Date:

| |
|--|
| |
| |
| |
| |

1. Details for Year 2017:

| | | | |
|-------------------------------------|--------------------------------------|--------------------------------|----------|
| <input type="checkbox"/> Last Year | <input type="checkbox"/> Approximate | Link to Hotel Questionnaire | R/H/S/SH |
| <input type="checkbox"/> Last Month | <input type="checkbox"/> Accurate | | |
| <input type="checkbox"/> Last Week | <input type="checkbox"/> Accounts | | |

Others

2. Suppliers details:

| Last year / Monthly/Weekly Figures | | | | |
|------------------------------------|-----------------|-------------------------------------|--------------------------|-------------------------------------|
| Suppliers (Male/ Female) | Residents of | No. Of Employees (Male / Female) | Formal/Informal Trade | Customers Type- Local/Foreign |
| | | | | |
| | | | | |

3. Revenue:

| Last year / Monthly/Weekly | Total Revenue: (BD Taka) | % of total revenue |
|--------------------------------|--------------------------|--------------------|
| Dry Fish | | |
| Textiles | | |
| Jewellery Based Handicrafts | | |
| Food (Rice, Pasta, Noodles) | | |

| | | |
|------------------------------------|--|--|
| Dry Food (Biscuits Beverage) | | |
| Fish (Sea/Local Fish) | | |
| Vegetables | | |
| Dairy and Eggs | | |
| Tea | | |
| Coffee | | |
| Water | | |
| Juice | | |
| Others | | |

4. Cost Structure of Dried Fish Market Operations: (BD Taka):

| <input type="checkbox"/> Financial <input type="checkbox"/> Percentage Staff Costs | Expenditure | % of good by value from: | | | Details / notes (supplier names if in Cox's Bazar) |
|--|-------------|--------------------------|------------|-----------|---|
| | | Cox's Bazar | Bangladesh | Elsewhere | |
| Tax | | | | | |
| Rent | | | | | |
| Packaging Cost | | | | | |
| Transportation | | | | | |
| Storages Cost | | | | | |
| Dry Fish | | | | | |
| Textiles | | | | | |
| Jewellery | | | | | |
| Food (Rice, Dry Food Beverage Fish Vegetables Dairy and Eggs | | | | | |
| Tea | | | | | |
| Coffee | | | | | |
| Water | | | | | |
| Juice | | | | | |
| Others | | | | | |
| Services | | | | | |
| Electricity | | | | | |
| Gas | | | | | |
| Water | | | | | |
| Sewerage | | | | | |
| Others | | | | | |

Appendix 9: A Structured Questionnaire : Handicrafts Retailers



Questionnaire Number#

Title: The Tourism Value Chain and the Prospect of Pro-Poor Tourism in Cox's Bazar, Bangladesh

Contact Person: Thomas Gomes (01638834652) bgomes@bournemouth.ac.uk

We would like to request your participation in a questionnaire. The purpose of this questionnaire is to analyse the contribution to local communities and specifically the relationship between tourism and poverty alleviation in Cox's Bazar.

Thank you very much for your support.

Name of Interviewee/s:

Designation:

Organization/Address:

Date:

| |
|--|
| |
| |
| |
| |

1. Details for Year 2017:

☐ Last Year ☐ Approximate

Link to Hotel
Handicrafts
Questionnaire

H/

☐ Last Month ☐ Accurate

☐ Last Week ☐ Accounts

Others:

2. Handicrafts Shop details:

| Last year / Monthly/Weekly Figures | | | | |
|------------------------------------|----------------------------|-------------------------------------|--------------------------|-------------------------------------|
| Shop Owner/s (Male / Female) | Residents of Shop owner | No. Of Employees (Male / Female) | Formal/Informal Trade | Customers Type- Local/Foreign |
| | | | | |

3. Revenue:

| Last year / Monthly/Weekly | Total Revenue: (BD Taka) | % of total revenue |
|-------------------------------------|--------------------------|--------------------|
| Textile Based Handicrafts | | |
| Jewellery Based Handicrafts | | |
| Bamboo & Woodwork Based Handicrafts | | |
| Ceramic Based Handicrafts | | |

| | | |
|--------------------------|--|--|
| Shells Based Handicrafts | | |
| Others | | |

4. Cost Structure of Handicrafts Operations: (BD Taka)

| <input type="checkbox"/> Financial <input type="checkbox"/> Percentage | Expenditure | % of good by value from: | | | Details / notes (supplier names if in Cox's Bazar) |
|---|-------------|--------------------------|------------|-----------|---|
| | | Cox's Bazar | Bangladesh | Elsewhere | |
| Staff | | | | | |
| Textile Based Handicrafts | | | | | |
| Jewellery Based | | | | | |
| Bamboo & Woodwork | | | | | |
| Ceramic Based Handicrafts | | | | | |
| Shells Based Handicrafts | | | | | |
| Others | | | | | |
| Services | | | | | |
| Electricity | | | | | |
| Gas | | | | | |
| Water | | | | | |
| Sewerage | | | | | |
| Shops rent | | | | | |
| Others | | | | | |

Appendix 10: A Structured Questionnaire: Dried Fish Retailers



Questionnaire Number#

Title: The Tourism Value Chain and the Prospect of Pro-Poor Tourism in Cox's Bazar, Bangladesh

Contact Person: Thomas Gomes (01638834652) bgomes@bournemouth.ac.uk

We would like to request your participation in a questionnaire. The purpose of this questionnaire is to analyse the contribution to local communities and specifically the relationship between tourism and poverty alleviation in Cox's Bazar.

Thank you very much for your support.

Name of Interviewee/s:

Designation:

Organization/Address:

Date:

| |
|--|
| |
| |
| |
| |

1. Details for Year 2017:

☐

Last Year

☐

Approximate

Link to Hotel
Questionnaire

R/H/T

☐

Last Month

☐

Accurate

☐

Last Week

☐

Accounts

Others:

2. Dry Fish Market details:

| Last year / Monthly/Weekly Figures | | | | |
|------------------------------------|----------------------------|-------------------------------------|--------------------------|-------------------------------------|
| Shop Owner/s (Male / Female) | Residents of Shop owner | No. Of Employees (Male / Female) | Formal/Informal Trade | Customers Type- Local/Foreign |
| | | | | |

3. Revenue:

| Last year / Monthly/Weekly | Total Revenue: (BD Taka) | % of total revenue |
|----------------------------|--------------------------|--------------------|
| Dry Fish | | |
| Telapia | | |
| Rohu | | |
| Catla | | |
| Others | | |

4. Cost Structure of Dry Fish Market Operations: (BD Taka)

| <input type="checkbox"/> Financial <input type="checkbox"/> Percentage | Expenditure | % of good by value from: | | | Details / notes (supplier names if in Cox's Bazar) |
|---|-------------|--------------------------|------------|-----------|---|
| | | Cox's Bazar | Bangladesh | Elsewhere | |
| Staff Costs | | | | | |
| Tax | | | | | |
| Rent | | | | | |
| Packaging Cost | | | | | |
| Transportation | | | | | |
| Storages Cost | | | | | |
| Baskets Cost | | | | | |
| Others: | | | | | |
| Services | | | | | |
| Electricity | | | | | |
| Water | | | | | |
| Sewerage | | | | | |
| Others: | | | | | |

Appendix 11: A Structured Questionnaire: Street Vendors



Questionnaire Number#

Title: The Tourism Value Chain and the Prospect of Pro-Poor Tourism in Cox's Bazar, Bangladesh

Contact Person: Thomas Gomes (01638834652) bgomes@bournemouth.ac.uk

We would like to request your participation in a questionnaire. The purpose of this questionnaire is to analyse the contribution to local communities and specifically the relationship between tourism and poverty alleviation in Cox's Bazar.

Thank you very much for your support.

Name of Interviewee/s:

Designation:

Organization/Address:

Date:

1. Street Vendors details:

| Last year / Monthly/Weekly Figures | | | | |
|------------------------------------|---------------------------------|-------------------|-----------------|-------------------------------|
| Male / Female | Residents of the Street Hawkers | Formal / Informal | No. of Tourists | Tourists Type-Local/Foreign % |
| | | | | |

2. Revenue:

| Last year / Monthly/Weekly | Total Revenue: (BD Taka) | % of total revenue |
|----------------------------|--------------------------|--------------------|
| Total Daily | | |
| Food | | |
| Fruits | | |
| Vegetables | | |
| Dry Fish | | |
| Drinks/Chocolate/Chips | | |
| Horse Riding | | |
| Beach Lounge Chairs | | |
| Beach Umbrellas | | |
| Jewelleries | | |
| Others | | |

4. Operations Cost Structure (BD Taka)

| <input type="checkbox"/> Financial <input type="checkbox"/> Percentage | Expenditure | % of good by value from: | | | Details / notes (supplier names if in Cox's Bazar) |
|---|-------------|--------------------------|------------|-----------|---|
| | | Cox's Bazar | Bangladesh | Elsewhere | |
| Staff Cost (If Applies) | | | | | |
| Rent / Fees (If Applies) | | | | | |
| Others: | | | | | |
| | | | | | |
| Services | | | | | |
| Miscellaneous | | | | | |
| Others: | | | | | |
| | | | | | |

Appendix 12: A Structured Questionnaire: Tuk Tuk Drivers



Questionnaire Number#

Title: The Tourism Value Chain and the Prospect of Pro-Poor Tourism in Cox's Bazar, Bangladesh

Contact Person: Thomas Gomes (01638834652) bgomes@bournemouth.ac.uk

We would like to request your participation in a questionnaire. The purpose of this questionnaire is to analyse the contribution to local communities and specifically the relationship between tourism and poverty alleviation in Cox's Bazar.

Thank you very much for your support.

Name of Interviewee/s:

Designation:

Organization/Address:

Date:

| |
|--|
| |
| |
| |
| |

1. Tuk Tuk Drivers Details:

| Last year / Monthly/Weekly Figures | | | | |
|------------------------------------|-----------------------------|--------------------------|--------------------|--------------------------------------|
| Tuk Tuk Drivers (Male / Female) | Residents of the Drivers | Own Tuk Tuk or Rented | No. of Tourists | Tourists Type- Local/Foreign % |
| | | | | |

2. Revenue:

| Last year / Monthly/Weekly | Total Revenue: (BD Taka) | % of total revenue |
|--|--------------------------|----------------------|
| Price (Per KM) | | |
| Trip Per Day from Chittagong To Cox's Bazar/Locals | <input type="text"/> | <input type="text"/> |
| Domestic Tourists Price | | |
| Foreign Tourists Price | | |
| Others | | |

3. Cost Structure of Tuk Tuk Operations: (BD Taka)

| <input type="checkbox"/> Financial <input type="checkbox"/> Percentage | Expenditure | % of good by value from: | | | Details / notes (supplier names if in Cox's Bazar) |
|---|-------------|--------------------------|------------|-----------|---|
| | | Cox's Bazar | Bangladesh | Elsewhere | |
| Rental Fees (If applies) | | | | | |
| Parking Fees | | | | | |
| Others: | | | | | |
| | | | | | |
| Services | | | | | |
| Fuel | | | | | |
| Maintenances | | | | | |
| Miscellaneous | | | | | |
| Others: | | | | | |
| | | | | | |

Appendix 13: A Structured Questionnaire: Rickshaw Pullers



Questionnaire Number#

Title: The Tourism Value Chain and the Prospect of Pro-Poor Tourism in Cox's Bazar, Bangladesh

Contact Person: Thomas Gomes (01638834652) bgomes@bournemouth.ac.uk

We would like to request your participation in a questionnaire. The purpose of this questionnaire is to analyse the contribution to local communities and specifically the relationship between tourism and poverty alleviation in Cox's Bazar.

Thank you very much for your support.

| | |
|------------------------|--|
| Name of Interviewee/s: | |
| Designation: | |
| Organization/Address: | |
| Date: | |

1. Rikshaw Drivers details:

| Last year / Monthly/Weekly Figures | | | | |
|------------------------------------|--------------------------|-----------------------|-----------------|-------------------------------|
| Rikshaw Drivers (Male / Female) | Residents of the Drivers | Own Rikshaw or Rented | No. of Tourists | Tourists Type-Local/Foreign % |
| | | | | |

2. Revenue:

| Last year / Monthly/Weekly | Total Revenue: (BD Taka) | % of total revenue |
|--|--------------------------|--------------------|
| Price Per Trip for Tourists | | |
| Delivery (Food, Vegetables for Hotels / | | |
| Trip Per Day from Cox's Bazar Locals / Beach | | |
| Domestic Tourists Price | | |
| Foreign Tourists Price | | |
| Others | | |

3. Cost Structure of Rikshaw Operations: (BD Taka)

| <input type="checkbox"/> Financial <input type="checkbox"/> Percentage | Expenditure | % of good by value from: | | | Details / notes (supplier names if in Cox's Bazar) |
|---|-------------|--------------------------|------------|-----------|---|
| | | Cox's Bazar | Bangladesh | Elsewhere | |
| Rental Fees (If applies) | | | | | |
| Others: | | | | | |
| | | | | | |
| | | | | | |
| Services | | | | | |
| Fuel | | | | | |
| Maintenances | | | | | |
| Miscellaneous | | | | | |
| Others: | | | | | |
| | | | | | |
| | | | | | |

Appendix 14: A Structured Questionnaire: Local Shop Beverage



Questionnaire Number#

Title: The Tourism Value Chain and the Prospect of Pro-Poor Tourism in Cox's Bazar, Bangladesh

Contact Person: Thomas Gomes (01638834652) bgomes@bournemouth.ac.uk

We would like to request your participation in a questionnaire. The purpose of this questionnaire is to analyse the contribution to local communities and specifically the relationship between tourism and poverty alleviation in Cox's Bazar.

Thank you very much for your support.

| | |
|------------------------|--|
| Name of Interviewee/s: | |
| Designation: | |
| Organization/Address: | |
| Date: | |

1. Details for Year 2017:

| | | | |
|-------------------------------------|--------------------------------------|--|------|
| <input type="checkbox"/> Last Year | <input type="checkbox"/> Approximate | Link to Hotel/Restaurant Beverage Questionnaire | H/R: |
| <input type="checkbox"/> Last Month | <input type="checkbox"/> Accurate | | |
| <input type="checkbox"/> Last Week | <input type="checkbox"/> Accounts | | |

Others: _____

2. Handicrafts Shop details:

| Last year / Monthly/Weekly Figures | | | | |
|------------------------------------|----------------------------|--|--------------------------|-------------------------------------|
| Shop Owner/s (Male / Female) | Residents of Shop owner | No. Of Employees (Male / Female) | Formal/Informal Trade | Customers Type- Local/Foreign |
| | | | | |

3. Revenue:

| Last year / Monthly/Weekly | Total Revenue: (BD Taka) | % of total revenue |
|----------------------------|--------------------------|--------------------|
| Beverage Items: | | |
| | | |
| | | |
| Food Items: | | |
| Others: | | |

4. Cost Structure of Beverage Operations: (BD Taka)

| <input type="checkbox"/> Financial <input type="checkbox"/> Percentage Staff | Expenditure | % of good by value from: | | | Details / notes (supplier names if in Cox's Bazar) |
|--|-------------|--------------------------|------------|-----------|---|
| | | Cox's Bazar | Bangladesh | Elsewhere | |
| | | | | | |
| Beverage Items: | | | | | |
| | | | | | |
| | | | | | |
| Others: | | | | | |
| Services | | | | | |
| Electricity | | | | | |
| Gas | | | | | |
| Water | | | | | |
| Sewerage | | | | | |
| Shops rent | | | | | |
| Others: | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

Appendix 15: A Structured Questionnaire: Beach Photographers



Questionnaire Number#

Title: The Tourism Value Chain and the Prospect of Pro-Poor Tourism in Cox's Bazar, Bangladesh

Contact Person: Thomas Gomes (01638834652) bgomes@bournemouth.ac.uk

We would like to request your participation in a questionnaire. The purpose of this questionnaire is to analyse the contribution to local communities and specifically the relationship between tourism and poverty alleviation in Cox's Bazar.

Thank you very much for your support.

Name of Interviewee/s:

Designation:

Organization/Address:

Date:

| |
|--|
| |
| |
| |
| |
| |

1. Camera Man details:

| Business Characteristics | | | | |
|--------------------------|------------------------------------|-------------------|-----------------|-------------------------------|
| Male / Female | Residents of the Street Camera Man | Formal / Informal | No. of Tourists | Tourists Type-Local/Foreign % |
| | | | | |

2. Revenue:

| Last year / | Total Revenue: (BD Taka) | % of total revenue |
|------------------------|--------------------------|--------------------|
| Total Daily | | |
| Per Picture Fees | | |
| Group Picture Fees | | |
| Training | | |
| Other source of income | | |
| Others | | |

3. Customers Ethnicity

From Cox's Bazar
 Outside of Cox's Bazar
 Outside of Bangladesh (Specified)

4. Tourists Seasons

January – March
 April – June
 July – September
 October – December

5. Cost Structure of Beach Photographers Operations: (BD Taka):

| <input type="text"/> Financial <input type="text"/> Percentage | Expenditure | % of good by value from: | | | Details / notes (supplier names if in Cox's Bazar) |
|---|-------------|--------------------------|------------|-----------|---|
| | | Cox's Bazar | Bangladesh | Elsewhere | |
| Staff Cost (If Applies) | | | | | |
| Rent / Fees (If Applies) | | | | | |
| Camera Cost (Per) | | | | | |
| Others: | | | | | |
| Services | | | | | |
| Miscellaneous | | | | | |
| Maintenance Cost | | | | | |
| Others: | | | | | |

Appendix 16: A Structured Questionnaire: Beach Umbrellas Rental



Questionnaire Number#

Title: The Tourism Value Chain and the Prospect of Pro-Poor Tourism in Cox's Bazar, Bangladesh

Contact Person: Thomas Gomes (01638834652) bgomes@bournemouth.ac.uk

We would like to request your participation in a questionnaire. The purpose of this questionnaire is to analyse the contribution to local communities and specifically the relationship between tourism and poverty alleviation in Cox's Bazar.

Thank you very much for your support.

| | |
|------------------------|--|
| Name of Interviewee/s: | |
| Designation: | |
| Organization/Address: | |
| Date: | |

1. Beach Umbrella Rentals' Details:

| Business Characteristics | | | | |
|--------------------------|------------------------------------|-------------------|-----------------|-------------------------------|
| Male / Female | Residents of the Street Camera Man | Formal / Informal | No. of Tourists | Tourists Type-Local/Foreign % |
| | | | | |

2. Revenue:

| Last year / Total Daily | Total Revenue: (BD Taka) | % of total revenue |
|--------------------------|--------------------------|--------------------|
| Per Umbrella Hourly Rate | | |
| Other source of income | | |
| Others | | |

3. Customers Ethnicity

| | | | |
|--------------------------|-----------------------------------|--------------------------|------------------------|
| <input type="checkbox"/> | From Cox's Bazar | <input type="checkbox"/> | Outside of Cox's Bazar |
| <input type="checkbox"/> | Outside of Bangladesh (Specified) | | |

4. Tourists Seasons

☐ January – March ☐ April – June ☐ July – September

☐ October – December

5. Cost Structure of Beach Umbrella Rentals Operations: (BD Taka):

| <input type="checkbox"/> Financial <input type="checkbox"/> Percentage | Expenditure | % of good by value from: | | | Details / notes (supplier names if in Cox's Bazar) |
|---|-------------|--------------------------|------------|-----------|---|
| | | Cox's Bazar | Bangladesh | Elsewhere | |
| Staff Cost (If Applies) | | | | | |
| Rent / Fees (If Applies) | | | | | |
| Others: | | | | | |
| Services | | | | | |
| Miscellaneous | | | | | |
| Maintenance Cost | | | | | |
| Others: | | | | | |

Appendix 17: A Structured Questionnaire: Jeep Tour Operators



Questionnaire Number#

Title: The Tourism Value Chain and the Prospect of Pro-Poor Tourism in Cox's Bazar, Bangladesh

Contact Person: Thomas Gomes (01638834652) bgomes@bournemouth.ac.uk

We would like to request your participation in a questionnaire. The purpose of this questionnaire is to analyse the contribution to local communities and specifically the relationship between tourism and poverty alleviation in Cox's Bazar.

Thank you very much for your support.

| | |
|------------------------|--|
| Name of Interviewee/s: | |
| Designation: | |
| Organization/Address: | |
| Date: | |

1. Jeep Tour Operators Details:

| Business Characteristics | | | | |
|--------------------------|------------------------------------|-------------------|-----------------|-------------------------------|
| Male / Female | Residents of the Street Camera Man | Formal / Informal | No. of Tourists | Tourists Type-Local/Foreign % |
| | | | | |

2. Revenue:

| Last year / Total Daily | Total Revenue: (BD Taka) | % of total revenue |
|-------------------------|--------------------------|--------------------|
| Rate for Tourists | | |
| Other source of income | | |
| Others | | |

3. Customers Ethnicity

| | | | |
|--------------------------|-----------------------------------|--------------------------|------------------------|
| <input type="checkbox"/> | From Cox's Bazar | <input type="checkbox"/> | Outside of Cox's Bazar |
| <input type="checkbox"/> | Outside of Bangladesh (Specified) | | |

4. Tourists Seasons

☐ January – March ☐ April – June ☐ July – September

☐ October – December

5. Cost Structure of Jeep Tour Operators Operations: (BD Taka):

| <input type="checkbox"/> Financial <input type="checkbox"/> Percentage | Expenditure | % of good by value from: | | | Details / notes (supplier names if in Cox's Bazar) |
|---|-------------|--------------------------|------------|-----------|---|
| | | Cox's Bazar | Bangladesh | Elsewhere | |
| Staff Cost (If Applies) | | | | | |
| Rent / Fees (If Applies) | | | | | |
| Others: | | | | | |
| Services | | | | | |
| Miscellaneous | | | | | |
| Maintenance Cost | | | | | |
| Others: | | | | | |

Appendix 18: A Structured Questionnaire: Households



Households Questionnaire Number#

Title: The Tourism Value Chain and the Prospect of Pro-Poor Tourism in Cox's Bazar, Bangladesh

Contact Person: Thomas Gomes (01638834652) bgomes@bournemouth.ac.uk

We would like to request your participation in a questionnaire. The purpose of this questionnaire is to analyse the contribution of tourism expenditure to local households. Specifically we will focus on household employment, income and expenditure in Cox's Bazar.

Thank you very much for your support.

| | | |
|--------------------------|-------------------------------|---------------------------------|
| Head of Household/Other: | Male <input type="checkbox"/> | Female <input type="checkbox"/> |
| Address/Village/Ward: | Other <input type="text"/> | |
| Date/Time: | <input type="text"/> | |
| | <input type="text"/> | |

Part A: Households Profile:

1. Gender:

☐ Male ☐ Female

2. Size of household:

3. Age:

☐ Below 18 ☐ 18-25 ☐ 26-35 ☐ 36-45
☐ 46-55 ☐ 56+

4. Education Level:

☐ No formal education ☐ Primary school
☐ Secondary school ☐ Higher Degree (College/University)

5. Occupation:

☐ Hotel Workers ☐ Restaurant Workers ☐ Handicraft Vendors
☐ Dried Fish Vendors ☐ Tuk Tuk Drivers
☐ Farmer ☐ Fisherman ☐ Rickshaw Puller

Others Tourism Related Occupation

Others Non-Tourism Related Occupation

6. Location of your household: _____
village/city/town/para/moholla

7. Residency status (Length) in Cox's Bazar

Born here Less than 10 years More than 10 years

8. What is your ethnicity identity?
 Bengali Rohingya Chakma Tripura
 Rakhain Khasia Other
 (Specify).....

PART-B: Household Income

9. Household income sources:

| Income Sources | No. of Person (Over 18 years of old) | | BD Tk. (Total Income) 2017 | | |
|---|---|--------|----------------------------|---------|--------|
| | Male | Female | Weekly | Monthly | Yearly |
| Restaurants | | | | | |
| Hotels | | | | | |
| Street Vendors (Food, Handicrafts, Jewellery, Beverage) | | | | | |
| Street Vendors (Dried Fish and others) | | | | | |
| Rickshaw Puller | | | | | |
| Tuk Tuk Driver | | | | | |
| Tour Guides | | | | | |
| Vegetable Farmer | | | | | |
| Fruit Seller | | | | | |
| Labour (Constructions) | | | | | |
| Daily Labour-Anything | | | | | |

| | | | | | |
|--|--|--|--|--|--|
| Labour (Garments) | | | | | |
| Fisheries | | | | | |
| Beach Activities Related Example----- | | | | | |
| Others..... | | | | | |

10. Are you the main income earner in your household? ☐ Yes ☐ No
If no, what is the other source of income?

11. If there were no tourists in Cox's Bazaar, would you increase your time working in another activity?

☐ Day labour ☐ Farming ☐ Garments Sector
☐ Part Time seasonal work
☐ Other (Specify).....

12. If there were no tourists in Cox's Bazaar, how would your household income change?

It would increase or ☐ fall by BD Tk. per month.

PART-C: Household Expenditure.

13. How much money do you spend on food items?

| Food Items expenditure (Non-Durable) | | | |
|--------------------------------------|---|--|--|
| Food Items | Expenditure per households-Weekly/Monthly/Yearly-2017 | | |
| Rice | | | |
| Meat | | | |
| Fish | | | |
| Fruit / Vegetables | | | |
| Dairy and Eggs | | | |
| Tea | | | |
| Water | | | |

14. How much money do you spend on non-food items?

| Non-Food Items expenditure (Non-Durable) | | | |
|--|---|--|--|
| Food Items | Expenditure per households-Weekly/Monthly/Yearly-2017 | | |
| Fuel | | | |
| Electricity | | | |
| Toiletries | | | |
| Education | | | |
| Clothing | | | |
| Other | | | |

15. How much money do you spend on durable items?

| Durable Items expenditure | | | |
|-----------------------------|---|--|--|
| Durable Items | Expenditure per households-Weekly/Monthly/Yearly-2017 | | |
| Radio/TV | | | |
| Mobile Phones | | | |
| White Goods (Fridge/Cooker) | | | |
| Scooter/Bicycle | | | |
| Other | | | |

16. Do you receive any remittance from your family members/friends? (if yes, please specify)

☐ Cox's Bazar ☐ Outside of Cox's Bazar (Specify
☐ Bangladesh ☐ Outside of Bangladesh
 (Specify).....

Appendix 19: Consent Form for Tourists, Businesses and Households



Title: The Tourism Value Chain and the Prospect of Pro-Poor Tourism in Cox's Bazar, Bangladesh

Contact Person: Thomas Gomes (01638834652) bgomes@bournemouth.ac.uk

We would like to request your participation in a questionnaire. The purpose of this questionnaire is to analyse the impact of tourism expenditure and contribution to poor households' incomes, specifically the relationship between tourism value chain and poverty alleviation in Cox's Bazar.

Confirmation and consent

I confirm that I have freely agreed to participate in the research project of Thomas Gomes. I have been briefed on what this involves and I agree to the use of the findings as described above. I give/ do not give permission for the interview to be surveyed. The questionnaire will be used only for the purpose of the research study.

Participant signature: _____

Name: _____

Date: _____

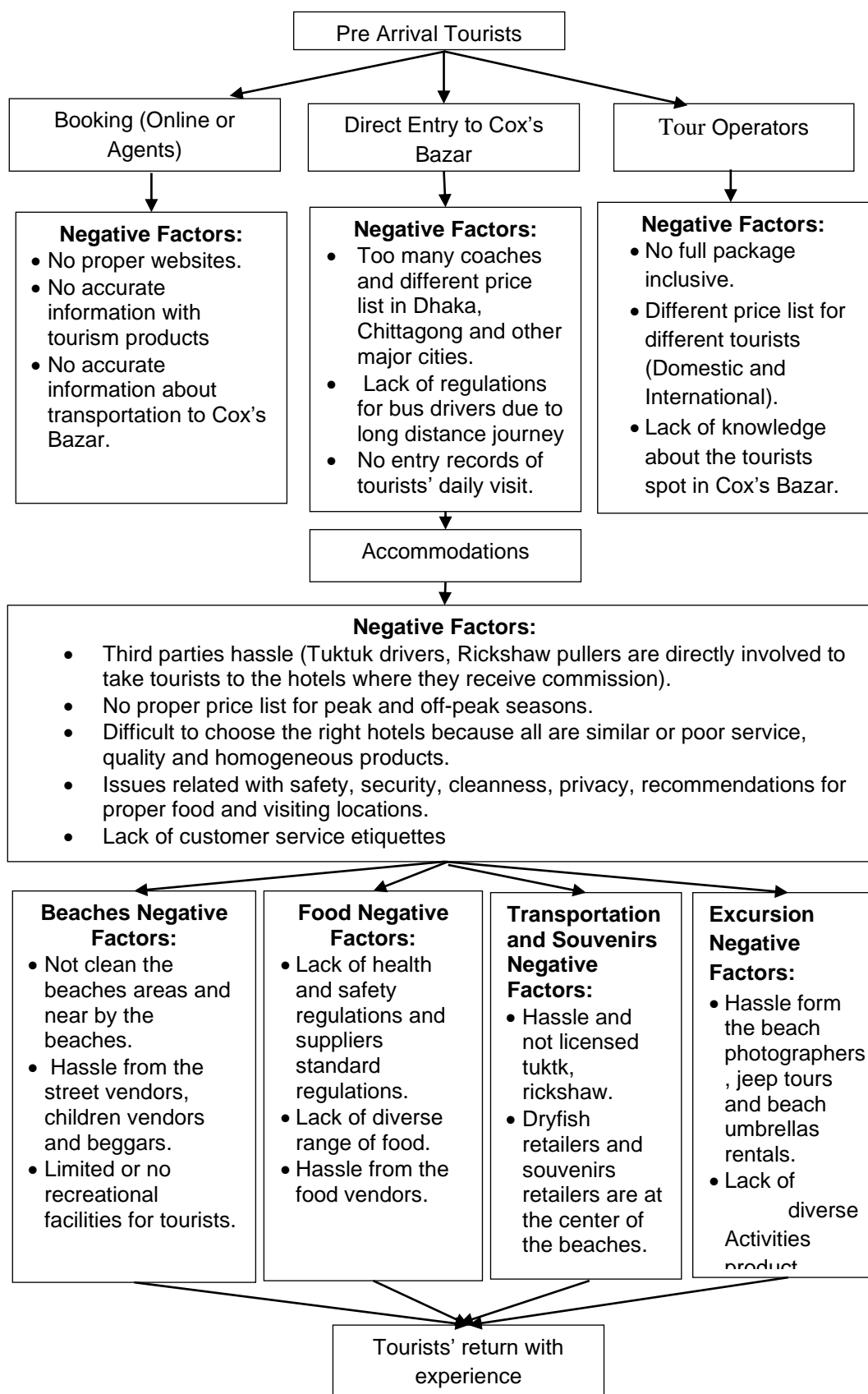
I confirm that I agree to keep the undertakings in this contract.

Researcher signature: _____

Name: _____

Date: _____

Appendix 20: Areas for Improvement (Tourist) in Cox's Bazar



Source: Author's Own Work based on the Field Data Collection Experience

2017

Appendix 21: Currency and Poverty Headcount Ratio Formula

Currency and Poverty line

| | | |
|---|----------|-------------|
| 1 USD equals Taka (PPP Exchange Rate) | 81.04 | 03/08/17 |
| PPP Conversion Rate | 0.39 | World Bank, |
| PPP Exchange rate | 31.77 | 2017 |
| Poverty line in USD (per person per day) | 1.90 | World Bank |
| Poverty line in Taka (per person per month) | 1,871.12 | |

Tax and VAT Assumptions

| | | |
|---------------------------------|-----------|---------|
| VAT rate | 15% | 13% |
| Corporation tax rate | | 25% |
| Income tax thresholds and rates | Upto | Monthly |
| 0% | 250,000 | 20,833 |
| 10% | 400,000 | 33,333 |
| 15% | 500,000 | 41,667 |
| 20% | 600,000 | 50,000 |
| 25% | 3,000,000 | 250,000 |
| 30% | | 0 |

<http://nbr.gov.bd/uploads/publications/107.pdf>

Source: Authors' Own Work 2019