

Tourism and Hospitality industry during the COVID-19 Pandemic: Impact analysis and some recovery strategies for Bangladesh

Md. Ashikur Rahman Avi, Mohammed Mosaraf Hossain, and Dr. Md. Amirul Islam

Abstract:

Though there is some secondary research regarding the impact of Coronavirus disease (Covid-19) on the overall tourism and hospitality industry in Bangladesh, the component-based detailed analysis is still uncovered. Therefore, this research aims at analyzing the impact of Covid-19 on the major components (accommodation, transportation, restaurants, and travel agency and tour operations) of the tourism and hospitality industry. In addressing the research aim, the qualitative approach is followed in this paper, and both primary and secondary data collection techniques are utilized. The collected data are analyzed using a theme-based approach. The findings found that the accommodation and transportation sectors are badly affected by Covid-19 compared to the restaurant and travel agency sectors. Based on the findings, this paper generates some recovery strategies from the industry associates' perspective. The findings, discussions, and suggestions of this paper are expected to add value to existing tourism literature and it sets a benchmark for the researchers, policy-makers, and practitioners of the tourism and hospitality industry of Bangladesh.



IJSB

Accepted 27 August 2022
Published 2 September 2022
DOI:10.5281/zenodo.704443

Keywords: COVID-19, pandemic crisis, impact, sub-sectors, tourism, hospitality industry, Bangladesh.

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Introduction

Traveling is termed as one of the key factors in spreading out the Covid-19 around the world (Dhaka Tribune 2020), and therefore, the restrictions on travel imposed by the governments of almost every country throughout the world have become a completely new trend (The Economic Time 2020). Though this infectious virus was first identified in December 2019 in Wuhan, China, Bangladesh confirmed its first Covid-19 on the 8th of March 2020 (World Health Organization 2020). Since then, the country has started losing its most valuable human resources, economic growth, and revenue earnings from almost every sector, and tourism is not an exception (Hossain, 2020). The United Nations World Tourism Organization (UNWTO) has reported that in 2020, the Covid-19 cost to Bangladesh's tourism industry is almost USD 470 million, whereas the Tour Operators Association of Bangladesh (TOAB), a local organization for tour operators, claimed that tourism sector in Bangladesh will lose of USD 672 million (The Business Standard 2020). Added to this, Pacific Asia Travel Association (PATA) Bangladesh Chapter argued that more than 0.3 million people directly or indirectly engaged with tourism-associated industries are at risk of losing their jobs (Pacific Asia Travel Association 2020). While these reports and assumptions represent the impact of Covid-19 on the overall tourism industry in Bangladesh, no studies specifically focus on Covid-19's impact on the four main components of the tourism and hospitality industry, including accommodation, transportation, restaurants, travel agencies, and tour operations. Hence, this research can be categorized as an exploratory study that aims to investigate the impact of Covid-19 on major components of the tourism sector (accommodation, transportation, restaurants, travel agencies, and tour operations) and propose recovery strategies in the context of Bangladesh. The principal objective of this research is to analyze the impact of Covid-19 on Bangladesh's tourism and hospitality industry, in particular the main sub-sectors in detail. Besides, the specific objectives cover i) presenting the current status of the country's accommodation, transportation, food and beverage, and recreation sectors; ii) identifying the losses incurred by those sectors due to Covid-19, and iii) formulating recovery strategies. In addressing the research aims and objectives, this paper utilized the following research questions: i) does the accommodation, transportation, restaurant, travel agency, and tour operating sector incur losses due to this pandemic? ii) Have employees been fired from your company due to Covid-19? iii) did Covid-19 spiral up the operational costs of your organization? iv) did your institution receive business operating guidelines/training from any public or private organization? v) did they receive any soft loan or governmental/non-governmental financial support during this pandemic? vi) how the losses can be recovered? etc. The novelty of this research is that it concentrates mainly on the impact of Covid-19 on the critical components of the tourism industry and generates recovery strategies by obtaining in-depth understandings from the stakeholders involved. The outcomes of this research are expected to set a benchmark for the public and private tourism authorities of the country in making tourism recovery decisions, planning, and policies. Besides, this study may assist future tourism researchers, academics, industry analysts, and practitioners in making a response plan for such global crises and pandemics. This research paper is organized into three sections. In the first section, a detailed description of the research design, sampling and data collection methods, research questions, and data analysis methods is presented. The second section discusses the key findings with a thematic analysis that demonstrates the sub-sector-based impacts of the tourism and hospitality industry in Bangladesh and the final section generates some policy guidelines for the successful recovery of the country's tourism and hospitality industry.

Literature review

Thought a substantial number of secondary studies have been conducted on the impact of Covid-19 on the tourism and hospitality affiliated industry in Bangladesh (Kumar & Nafi, 2020; Hafsa 2020; Horaira 2021; Chowdhury 2020; Sufian & Hoque, 2022; Haque 2020; and Islam 2021, no studies incorporated the voice, interest, and proposals of the industry stakeholders. Based on some reports, both Kumar & Nafi (2020) and Hafsa (2020) assumed that the tourism and hospitality industry of Bangladesh will suffer a huge economic loss because of Covid-19. Accordingly, Horaira (2021) reviewed some reports published by the tourism and hospitality management organizations such as UNWTO, PATA, World Travel and Tourism Council, etc. and proposed some recovery recommendations for the travel and tourism industry. In analyzing the impact of Covid-19 on tourism and hospitality industry in Bangladesh, Chowdhury (2020) focused only five listed Travel and Leisure category companies of Dhaka Stock Exchange (DSE) and found that the losses incurred by the industry is catastrophic. In addition, Sufian & Hoque (2022) narrowed down their study concentrating only on the Sylhet region. Islam (2021) analyzed the impact of Covid-19 on tourism industry in Bangladesh by reviewing secondary publications from March 2020 to March 2021 and concluded that the Covid-19 has a number of detrimental effects on the tourism industry, particularly significant income losses, a large percentage of employment layoffs, and the closure of businesses both temporarily and permanently. So it is well evident that the main components or sub-sectors based impact analysis and the stakeholders' point of view regarding the impact of Covid-19 on their businesses and suggestions for the quickest recovery are still completely absent in the context of Bangladesh. Hence, this qualitative study mainly focuses on obtaining in-depth understandings from the stakeholders involved and thus identifies the sub-sector-based impact and generates suggestions as recovery strategy.

Research Method

Research design

This research focused on analyzing the impact of Covid-19 on the tourism and hospitality industries and proposing recovery strategies for the industry's associates. In so doing, this research was conducted by following the qualitative research method as the aptitude for using a qualitative approach is well recognized in the context of a developing nation when the active participation of the stakeholders is required in the research setting (Camfield et al., 2009).

Sampling and Data collection method

To achieve the research objectives, this study employed both primary and secondary data collection techniques. A qualitative interview technique was utilized as the primary data collection method as it offers wide-ranging coverage and releases in-depth insights into the study because of its qualitative nature (Thompson, 2000; Denzin and Lincoln, 2008). It is also recognized that the efficacy of the qualitative in-depth interview methodology over the traditional survey method in achieving a detailed understanding of the research issues is because of its versatility (Rubin and Rubin, 2011; Yin, 2017). The personnel (hoteliers, tour operators, tour guides, transport personnel, restaurant owners, food and beverage servers, etc.) affiliated with the tourism and hospitality industry of Bangladesh was considered the population of this study. The purposive judgmental sampling technique was used to sample the population, and respondents were interviewed to gather the information relevant to this research. In total, 25 participants were interviewed in this study. The profile of the research participants is presented in the following table. The average duration of the interview sessions was 26 minutes. The interviewer stopped interviewing when they observed data saturation. Before interviewing, the researcher shared the research objectives with the interviewees and based on their consent the whole interview session was recorded, and key points were noted.

Table.1: Category and profile of the research participants.

S.L.	Category of the participants	Interview code
I.	Hoteliers	interview no.1, 4, 8, 19, 20.
II.	Tour operator	interview no. 3, 14, 15, 22.
III.	Tour guide	interview no. 2, 5, 16, 21.
IV.	Transport personnel	interview no. 6, 7, 17, 24.
V.	Restaurant owner	interview no. 9, 10, 18, 23
VI.	Food and beverage server	interview no. 11, 12, 13, 25.

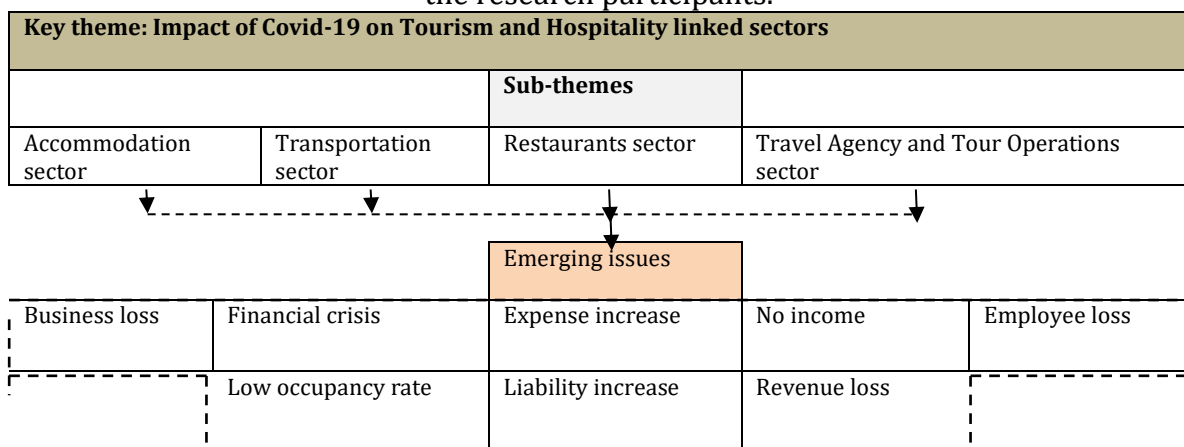
Data analysis method

For analyzing the primary data, six steps of the thematic analysis procedure suggested by Braun and Clarke (2006) were applied in this research. Before producing the finding section, the researchers firstly transcribed and translated the audio files for data familiarization and initial coding. Then the data codes were assembled according to the potential themes which were reviewed and defined later.

Findings of the research

The opinion, comments, and suggestions of the research participants are presented in this section. Almost every participant argued that their industry is badly affected by the covid-19 pandemic. They described their sufferings because of Covid-19 and identified several issues which are thematically analyzed and summarized (see exhibit 1) in this section. Most of the research participants pointed out business loss, financial crisis, increase in operating expense, low/no income, employee loss, poor occupancy rate, an increase in liability, and revenue loss as the impact of Covid-19 on their sector.

Exhibit 1: Impact of Covid-19 on tourism and hospitality business sub-sectors identified by the research participants.



It was found in the research that both the accommodation and transportation sectors incurred the highest losses among the other sub-sectors of the tourism and hospitality industry. In this regard, the comments of the two participants are presented following-

"As soon as the coronavirus cases appeared in Bangladesh, 90 % of reservations of our hotel were canceled. Later, when the lockdown was announced, the remaining 10% of the reservations were canceled as well. This hotel did not receive any guests for nearly a year and the operating costs continued to rise too. With no recourse, the owner of the property started laying off employees." [Interview no. 4]

"..to prevent the spread of Covid-19, the Government of Bangladesh (GoB) declared a nationwide lockdown; causing our transportation sector (bus, rail, air, and water

transport) to halt for an uncertain period and we were jobless for nearly 6 to 7 months." [Interview no. 7]

In the line with these findings, Bangladesh Institute for Development Studies (BIDS) reported that the hospitality and tourism sectors have suffered a loss of approximately 6.2 billion USD due to Covid-19 and if this industry was not affected by the pandemic, it would have contributed 1.5 trillion USD in total value addition of this country (Dhaka Post 2022). However, out of total losses, the transportation sector covers 40%, hotels cover 29%, and resorts and restaurants cover 25% of the losses (Kaler Kantha 2022, Jugantor 2022). So, based on the findings and report it is evident that the transportation and accommodation (hotel and resorts) sector suffer the most because of Covid-19. The issues such as 'financial crisis', 'revenue losses', and 'employee loss' were stressed by 90% of participants in this research. As tourism and hospitality affiliated businesses were stopped for a long while due to Covid-19, the operators faced great difficulties to bear the daily expenses. One participant [interview no. 6] from the transportation category stated that "our income was greatly affected because of Covid-19, and the most difficult challenge was to pay office rent, salaries of staff, and operating expenses. For the first 2/3 months, we managed everyone by borrowing money, but day by day the situation became too worsened, we had no choice but to reduce the number of offices and staff". Such comment was equally endorsed by many participants from different categories for example- interview no. 11, 12, and 19. Sardar et al., (2022) also found that the average cost of running restaurant businesses increased, and several employees were fired from their job because of Covid-19. The average response rate of the research participants is displayed in the following exhibit 2. Added to these, Kaler Kantha (2022) reported that during 2019-2020, the average number of workers in the accommodation (hotel and resorts only) sector was 42% lower but the employee layoffs rate was 317%. In comparison to the accommodation sector, travel agencies, tour operators, and tourism Small Medium Enterprises (SMEs) sectors saw fewer employee hiring and layoffs in 2019-2020. This situation is completely different in the cases of restaurants, transportation companies, and amusement park sectors. In these two years, the restaurant sector employed more than two people on average. Accordingly, it was also reported that one lakh 41 thousand service holders directly linked to the tourism and hospitality industry lost their jobs because of Covid-19 (The Daily Inqilab 2022, Dhaka Post 2022, and Jugantor 2022).

Exhibit 2: Respondent's response

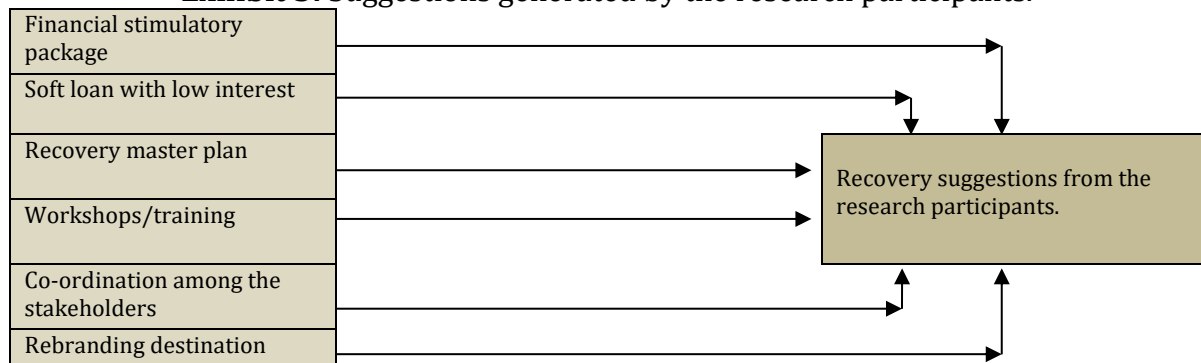
Impact of Covid-19 on Tourism and Hospitality linked sectors										
Yes (✓); No (X); Respondent's response (%)										
Sector:	Accommodation (A)	Transportation (T)	Restaurants (R)		Travel Agency and Tour Operations (TATO)					
Questions			Sectors							
			(A)		(T)		(R)		(TATO)	
Did your institution incur losses due to this Covid-19?			✓	95%	✓	100%	✓	50%	✓	60%
Have employees been fired from your company due to Covid-19?			✓	95%	✓	95%	X	25%	X	20%
Did Covid-19 spiral up the operational costs of your organization?			✓	95%	✓	90%	✓	60%	✓	10%
Did your institution receive any business operating guidelines/training from any public or private organization?			X	0%	X	0%	X	0%	X	0%
Did you receive any soft loan or governmental/non-governmental financial support during this pandemic?			X	0%	X	0%	X	0%	X	0%

From exhibit 2, it is well evident that the highest number of losses is incurred by the accommodation and transportation sector whereas the restaurant and travel agency and tour operator sector suffer comparatively lower. Most of the research participants (95%) opined that both the accommodation and transportation sectors lost the highest number of employees

and the operational cost also increased in these sectors due to Covid-19. Besides this, the restaurant and travel agency and tour operator sectors fired relatively fewer employees than the accommodation and transportation sectors, though their operation costs increased a little bit because of Covid-19. The participants from the restaurant category stated that during the pandemic they survived by taking orders online and providing home delivery services [interview no. 13 and 23]. In response to the questions regarding receiving any business operating guidelines/training, soft loan, or governmental/non-governmental financial support from any public or private organization during this pandemic, all the participants answered that they did not receive any sort of survival support from any authoritative bodies affiliated to tourism and hospitality industry. Similarly, Kaler Kantha (2022) noted that though the GoB has taken different initiatives to provide survival support to many industries which suffered a great loss as a result of Covid-19, the tourism and hospitality industry was underestimated. However, as suggestions providing a soft financial stimulatory package, bank loan with a low-interest rate, formulation of a recovery master plan, arrangement of workshops/training, ensuring coordination among the stakeholders, destination rebranding, etc. were echoed in the comments of the participants in this research.

Some policy guidelines

Bangladesh has ample opportunities for tourism as it hosts thousands of natural, archeological, religious, rural, medical, wetlands, marine, and coastal tourism resources throughout the country (Rahman et al., 2018, Avi et al., 2021b, Muneem et al., 2020, Muneem and Avi, 2017; Avi and Hassan, 2022). The tourism and hospitality industry of this country received a great shock from the cause of Covid-19. As a result, all the stakeholders affiliated with subsectors of the tourism and hospitality industry suffered a lot which is well evident in this research. Based on the comments generated by the participants, firstly, this research suggests providing state aid (short and long-term financial support with minimal interest rate) to the parties involved so that the subsectors can get some breathing space to reestablish their businesses. In this vein, Bhuiyan (2022), Kaler Kantha (2022), and Jugantor (2022) equally underscored providing stimulus financial packages to the subsectors of the tourism and hospitality industry. Secondly, this paper recommends formulating and implementing a recovery master plan incorporating all the stakeholders of the industry as Muneem et al., (2020) prioritized a master plan as a prerequisite for successful tourism development. Thirdly, the arrangement of training sessions and assurance of effective coordination among the tourism stakeholders is suggested by this research. The Ministry of Civil Aviation and Tourism (MoCAT), Bangladesh Tourism Board (BTB), and Bangladesh Parjatan Corporation (BPC) under the direct supervision of GoB can play a significant role in conducting training programs and assuring coordination at central, regional, and local level. Finally, this research suggests that the country needs special attention in promoting and branding its tourism products and services. In this regard, the performance of BTB, the national tourism organization of Bangladesh, is found dissatisfactory (Muneem et al., 2019). Hence, the existing marketing policy needs to be revised. Moreover, MoCAT, BTB, and BPC should consider the application of innovative technologies such as augmented reality, virtual reality, artificial intelligence, software-based applications, social media, etc. while promoting and branding the tourism attractions as technology applications in promoting tourism products and services are well recognized in several pieces of research (Hossain et al., 2020; Avi and Sardar, 2021; Avi et al., 2019; Avi et al., 2020; Bappy and Avi, 2021; Avi et al., 2021a; Hassan and Avi, 2022; Avi and Hassan, 2021). Besides, the role of governmental and non-governmental bodies affiliated with the tourism industry in applying technologies in the tourism and hospitality industry of Bangladesh proposed by Tripura and Avi (2021) is highly endorsed by this research.

Exhibit 3: Suggestions generated by the research participants.

Conclusion and future research direction

As there were no qualitative studies regarding the impact of Covid-19 on the major subsectors of tourism and hospitality industry in the perspective of Bangladesh, this qualitative research aims at analyzing the impact of Covid-19 on the major subsectors (accommodation, transportation, restaurants, and travel agency and tour operations) of the tourism and hospitality industry in Bangladesh from the stakeholders' viewpoint. From the comments and opinions of the industry stakeholders, it is well-evident that the losses of business, low occupancy rate, poor income, increase in expenditure, financial crisis, liability increase, employee loss, revenue loss, etc. were the common effects of Covid-19 on the aforementioned subsectors of tourism and hospitality industry in Bangladesh. It was also found that among the four subsectors, the accommodation and transportation segments were more deadly affected than restaurants and travel agencies, and tour operators.

Besides identifying the effects of covid-19, this research also generates some suggestions and policy guidelines as recovery strategies relying on the comments and views shared by the research participants. The suggestions include providing short and long-term financial support with a minimal interest rate to the industry stakeholders, formulating and implementing a recovery master plan, arrangement of training sessions, and assurance of effective co-ordination among the tourism stakeholders, and rebranding the tourism destinations by revising and/or updating the marketing and promotional strategies and applying innovative technologies. This qualitative research is one of the first few attempts in Bangladesh that identified the impacts of Covid-19 on the tourism and hospitality subsectors directly from the stakeholders involved and as recovery strategies it also generated suggestions from their point of view and thus, this study could be a benchmark for future researchers. By identifying the detailed role of the associated authorities such as MoCAT, BTB, and BPC future researchers can concentrate and contribute more to this research field.

Acknowledgment

This research work is conducted under the financial grants provided by the University Grants Commission (UGC) and Pabna University of Science and Technology (PUST).

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Cite this article:

Avi, M. A. R., Hossain, M. M., Islam & M. A., (2022). Tourism and Hospitality industry during the COVID-19 Pandemic: Impact analysis and some recovery strategies for Bangladesh. *International Journal of Science and Business*, 14(1), 40-49. doi: <https://doi.org/10.5281/zenodo.7044443>

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