

## TRAVEL AND TOURISM COMPETITIVENESS OF THE WORLD'S TOP TOURISM DESTINATIONS: AN EXPLORATORY ASSESSMENT

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*ABSTRACT: In the recent years, competitiveness has become one of the common concepts employed to approach and describe the sustainable development of the travel and tourism industry. Competitiveness of the travel and tourism industry, like of the tourist destinations, is defined taking into consideration a set of reference elements related to the major dimensions of the industry, such as the business environment, infrastructure, laws and regulations, and resources available.*

*The paper assesses the competitiveness of the travel and tourism industry in the World's top 25 tourist destinations based on the methodology and the specific results provided in the Travel and Tourism Competitiveness Report and taking into consideration the most representative performance indicators of this industry, international tourist arrivals and international tourist receipts, provided by the World Tourism Organization.*

*Keywords: travel and tourism, tourist destinations, competitiveness*

*JEL codes: M31, L83*

### **Introduction**

In the recent years, competitiveness has become one of the common concepts employed to approach and describe the sustainable development of the travel and tourism industry: specialized literature has defined and circulated concepts such as travel and tourism or tourist destinations competitiveness suggesting not only the importance of the concept but also the necessary focus the tourist organizations should put on.

The competitiveness of tourism destinations and, generally, the overall competitiveness of the travel and tourism industry, became vital for their survival and growth in the international market, in the conditions of increasing leisure time and rising levels of disposable income (Echtner and Ritchie, 2003). If in 1950, top fifteen tourist destinations attracted almost all of the total number of tourists worldwide, sixty years later the percentage decreased from 98% to 57% (UNWTO, 2008). Given the situation of the world economy, with a decrease in the overall demand for tourist services, the focus of the tourism organizations and destinations has shifted from simply attracting more tourists to the making the tourist destinations more competitive.

Camprubi, Guia, and Comas (2008) consider the tourist destination as a network of relations between different actors that, together, create the tourist product.

The competitiveness of a tourism destination is a complex and relative concept, a part of this complexity being suggested by the definition given to the tourist destination seen as places or some form of actual or perceived boundary, such as physical boundaries of an island, political boundaries, or even market-created boundaries (Kotler, Bowen, and Markens, 2006).

As each destination may have different traditions, history, cultural and natural resources, as

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well as unique ambitions and means of accomplishing objectives, several authors have created or adapted different models for measuring the competitiveness of a tourist destination.

One of the tools that can be used to analyze and measure the competitiveness of a tourist destination can be the Porter's five forces model, which takes into consideration the factor conditions, demand conditions, related industries, corporate strategy, structure and rivalry in the sector (Claver-Cortes, Molina-Azarín, and Pereira-Moliner, 2007).

Seen from a macroeconomic perspective, tourism destination competitiveness has a support the three pillars of natural resources, climate and culture (Lumsdon, 1997).

The competitiveness of a tourism destination, as well as that of the overall travel and tourism industry, can be approached having in mind the structure of the marketing macro-environment. Taking into account the fact that overall competitiveness of the travel and tourism is determined and driven by the competitiveness of each of the components of the macro-environment, there are to be taken into consideration and measured an economic competitiveness, a social and cultural competitiveness, an environmental competitiveness, a political competitiveness and a technologically-based competitiveness.

Price competitiveness is a frequent issue in the tourism competitiveness literature. (Craigwell, 2007). Dwyer, Forsyth and Rao (2000) examine the price competitiveness of travel and tourism in 19 destination countries using efficiency and productivity to show the competitiveness among destination countries. Zhang and Jensen (2007) developed a model for explaining tourism flows by adding to the price competitiveness the natural endowments, climate, geography, and cultural heritage.

Consumers' points-of-view are, also, essential in the assessment of the tourism destination competitiveness. Resources they have to allocate in order to reach a destination – money, time and effort, respectively, the expected return in education, experiences, fun, relaxation and memories are among the elements to be considered in this respect (Kotler, 2006). Beerli and Martin (2004) consider tourism destination competitiveness as being a result of the perceived image of the destination, and this image is influenced in great extent by customer's motivations, experiences and socio-demographic characteristics.

Sustainable tourism, as a way of increasing competitiveness of tourist destinations, is also mentioned by several authors (Ozturk and Eraydin, 2009, Williams and Ponsford, 2009). Mihalič (2000) shows that proper managerial efforts in the field of environmental impact and environmental quality management as well as environmental marketing activities have a great influence in increasing tourism destination competitiveness.

Palmer and Bejon (in Wang and Krakover, 2008) state that long-term competitiveness of a tourist destination is determined in great extent by the balance between cooperation and competition of business in tourism industry (1995). Also, branding process for a tourism destination is crucial for long-term destination competitiveness (Boo, Busser and Baloglu, 2009).

Ejarque (2005) proposes the following set of elements to be considered in analyzing the tourist destinations: the geographical location, environmental and physical conditions, demographical situation, existing tourist attractions, image perceived (Royo-Vela, 2009) and image associated with the tourist destination, tourism resources (natural, cultural, activities, infrastructure and services).

After Ritchie and Crouch (2003) have used the concepts of comparative and competitive advantages for describing the model of destination competitiveness, Crouch (2006) developed a study evaluating the importance of attributes defining destination competitiveness using expert judgment. The importance of these attributes varies from one destination to another. This is why models like Porter (1990), Dwyer and Kim (2003), Hassan (2000) were adapted to certain particular destinations (in Gomezelj and Mihalic, 2008).

Cracolici and Nijkamp (2008) used a set of six factors to determine the competitiveness of Southern Italian regions as tourism destination: natural and cultural resources, amount and quality

of accommodation and restaurants, accessibility to transportation system, all the activities available at the destination, tourist safety, and local resident behavior.

Even if there are some factors considered by the majority of the authors in the tourism competitiveness literature, science has not yet agreed for an unique set of pillars to consider when measuring this competitiveness.

### **Methodological Notes**

The main objective aimed through the present research approach was to assess the relationships between the overall travel and tourism competitiveness and its three major dimensions, the consistency of these major dimensions and the specific pillars of competitiveness, and the association between the overall competitiveness and performances of the travel and tourism industry and the main outputs in terms of performances generated by the industry in the case of the world's top 25 tourist destinations.

In order to conduct the assessment, it was employed a set of data included in The Travel & Tourism Competitiveness Report 2008 issued by the World Economic Forum in Geneva, Switzerland. Twenty-five countries have been selected using the World Tourism Organization data referring to the international tourist arrivals: Austria, Canada, China, Croatia, Egypt, France, Germany, Greece, Hong Kong (China), Hungary, Italy, Malaysia, Mexico, Netherlands, Poland, Portugal, Russian Federation, Saudi Arabia, South Africa, Spain, Thailand, Turkey, Ukraine, United Kingdom, and United States.

Selection of the tourist destinations and gathering of the corresponding data has been done as to avoid the effect of the world economic crisis (being collected and processed data referring to the competitiveness and performances of the selected countries for the years 2007). Although Macau has been included on the World Tourism Organization's list of the first 25 tourist destinations in terms of their international tourist arrivals, this destination has not been selected due to the as the Travel and Tourism Competitiveness Report does not provide any data referring to this destination. The group of the selected countries accounts for 632.3 million tourist arrivals (representing 70.02 % in the total of the international tourist arrivals), respectively for 576.8 billion US Dollars (representing 67.38 % in the total of the international tourism receipts).

Variables of the research approach have been the following:

- overall travel and tourism competitiveness, as it has been defined and expressed by the indexes determined, according to the specific methodologies, for the considered countries;
- competitiveness of the regulatory framework, business environment and infrastructure and human, cultural and natural resources, as it has been defined and expressed by the sub-indexes determined, according to the specific methodologies, for all the considered countries;
- pillars of the regulatory framework – policy rules and regulations, environmental sustainability, safety and security, health and hygiene, and prioritization of travel and tourism;
- pillars of the business environment and infrastructure – air transportation, ground transportation, tourism infrastructure, information and communication technology and price competitiveness;
- pillars of human, cultural and natural resources – human resources, affinity for travel and tourism, natural resources, and cultural resources; and,
- performances of the travel and tourism industry and economy, as they are expressed through the international tourist arrivals and the international tourism receipts, for the considered countries.

Pearson correlation coefficient has been employed to conduct the measurements and produce the aimed results.

### Main Findings of the Research

An overall assessment of the travel and tourism competitiveness at the level of the world's top 25 tourism destinations allows drawing the conclusion according to which these destinations do not form a homogeneous group: there are significant differences between them as the corresponding values of the Travel and Tourism Competitive Index (TTCI) reveal. Austria (with an TTCI score of 5.43) and Germany (5.41) are leading the hierarchy built in terms of the overall travel and tourism competitiveness while Saudi Arabia (3.68) and Ukraine (3.76) are the tourist destinations ending it. The average TTCI value, of 4.66 (determined on a scale from one to seven), may suggest that although it is about the world's top tourist destinations, their travel and tourism competitiveness could, and probably should, be improved.

Table no. 1

### Major dimensions of the travel and tourism competitiveness of the world's top tourist destinations

Countries	TTCI	RF	BEI	HCN
Austria	5.43	5.86	5.27	5.16
Germany	5.41	5.67	5.43	5.13
Spain	5.30	5.24	5.32	5.33
United Kingdom	5.28	5.28	5.32	5.26
United States	5.28	4.75	5.58	5.52
Canada	5.26	5.31	5.40	5.07
France	5.23	5.57	5.28	4.85
Hong Kong (China)	5.09	5.91	5.04	4.31
Portugal	5.09	5.50	4.83	4.93
Netherlands	5.01	5.35	5.11	4.58
Greece	4.92	5.46	4.63	4.66
Italy	4.84	4.99	4.77	4.74
Malaysia	4.63	5.04	4.31	4.55
Hungary	4.60	5.40	4.18	4.21
Croatia	4.59	5.02	4.32	4.43
Thailand	4.37	4.46	4.17	4.49
Turkey	4.19	4.57	3.73	4.28
Mexico	4.18	4.30	3.62	4.62
Poland	4.18	4.51	3.62	4.42
South Africa	4.11	4.31	3.85	4.18
China	4.06	3.91	3.45	4.81
Russian Federation	4.04	4.21	3.56	4.35
Egypt	3.96	4.54	3.47	3.86
Ukraine	3.76	4.53	3.24	3.51
Saudi Arabia	3.68	3.83	3.78	3.43

Source: TTCI – Travel and Tourism Competitiveness Index; RF – Regulatory Framework subindex; BEI – Business Environment and Infrastructure subindex; HCN – Human, Cultural and Natural resources subindex; Countries are ranked in the descending order of the TTC index.

Assessment of the relationships between the competitiveness of the travel and tourism and its major dimensions at the level of the world's top tourist destinations illustrates the very strong association between the overall competitiveness and the business environment and infrastructure ( $r = 0.97$ ), as well as the strong associations between the overall competitiveness and the specific regulatory framework ( $r = 0.86$ ), respectively the human, cultural and natural resources ( $r = 0.83$ ). The appropriate environment and infrastructure seems to provide the background for the development of the tourism business while the regulatory framework and the available human

resources and natural and cultural heritage contribute significantly to the improvement and maintaining of the travel and tourism competitiveness of the considered countries.

With an average value of 4.94, the **regulatory framework** appears as a factor supporting the overall competitiveness of the world's top 25 tourist destinations. There are significant differences between these destinations in terms of the competitiveness of the regulatory framework: Hong Kong (China; 5.91), Austria (5.86), and Germany (5.67) are leading the hierarchy having a very good set of specific regulations while Saudi Arabia (3.83) and China (3.91) are the destinations that have serious problems to solve in this respect.

Table no. 2

**Major pillars of the travel and tourism competitiveness of the world's top 25 tourist destinations in terms of the regulatory framework**

Countries	TTCI	RF	PRR	ES	SS	HH	PTT
Austria	5.43	5.86	5.16	5.57	6.41	6.77	5.41
Germany	5.41	5.67	5.46	5.82	5.88	6.77	4.40
Spain	5.30	5.24	4.44	4.95	5.10	5.88	5.84
United Kingdom	5.28	5.28	5.22	4.02	3.75	5.50	5.26
United States	5.28	4.75	5.54	5.56	5.01	5.58	4.69
Canada	5.26	5.31	5.43	4.90	5.68	5.48	5.05
France	5.23	5.57	5.15	5.75	5.18	6.76	5.00
Hong Kong (China)	5.09	5.91	5.95	4.56	6.27	7.00	5.78
Portugal	5.09	5.50	5.19	5.36	5.94	5.96	5.04
Netherlands	5.01	5.35	5.42	5.56	5.65	6.15	3.96
Greece	4.92	5.46	4.35	4.85	5.69	6.42	5.99
Italy	4.84	4.99	4.42	4.87	4.80	6.28	4.58
Malaysia	4.63	5.04	5.34	4.79	5.51	4.43	5.12
Hungary	4.60	5.40	4.82	5.05	5.73	6.57	4.80
Croatia	4.59	5.02	4.26	4.84	5.52	5.99	4.48
Thailand	4.37	4.46	4.50	4.27	3.95	4.49	5.07
Turkey	4.19	4.57	4.67	4.11	4.85	4.61	4.60
Mexico	4.18	4.30	4.56	4.20	3.59	4.21	4.94
Poland	4.18	4.51	4.28	4.58	4.58	4.96	4.18
South Africa	4.11	4.31	4.80	4.92	3.55	3.96	4.32
China	4.06	3.91	3.96	3.92	3.60	3.21	4.86
Russian Federation	4.04	4.21	3.46	3.79	3.16	6.65	3.98
Egypt	3.96	4.54	4.18	4.25	4.66	3.94	5.66
Ukraine	3.76	4.53	3.72	4.23	4.53	6.40	3.76
Saudi Arabia	3.68	3.83	4.02	3.44	5.09	2.88	3.72

Source: *TTCI – Travel and Tourism Competitiveness Index; RF – Regulatory Framework subindex; PRR – Policy Rules and Regulations subindex; ES – Environmental Sustainability subindex; SS – Safety and Security subindex; HH – Health and Hygiene subindex; PTT – Prioritization of Travel and Tourism subindex; Countries are ranked in the descending order of the TTC Index.*

The associations between the specific pillars and the overall competitiveness of the regulatory framework appear to be strong in the cases of the safety and security ( $r = 0.83$ ), environmental sustainability ( $r = 0.82$ ), health and hygiene ( $r = 0.78$ ), and policy rules and regulations ( $r = 0.73$ ), respectively moderate in the case of the prioritization of travel and tourism. These values show, on a hand, that positions currently held by the considered countries, as top tourist destinations of the world, are significantly supported by the results obtained under the efforts done to improve the safety and security for the consumers of tourist products and services, to

implement measures aiming to generate the sustainable development of the tourism activities, to meet the specific market requirements and expectations regarding the health and hygiene, and, as a proper background for all of these, to build and enforce appropriate policy rules and regulations in the area of travel and tourism.

Prioritization of travel and tourism has appeared as a determinant of a secondary importance in terms of the competitiveness of the regulatory framework. This must be the direct consequence of the fact that countries holding the top positions in the world hierarchy of the tourist destinations had already considered, and some of them still consider, the travel and tourism industry, with a high priority, in their recent or current development. A higher attention given by the Governments to the industry, a more effective marketing and branding aiming to attract an increasing number of tourists and the better attendance at the specialized events in the industry could improve the contribution of this pillar to the creation of a better regulatory framework supporting the development and competitiveness of the travel and tourism industry.

Table no. 3

**Major pillars of the travel and tourism competitiveness in the world's top 25 tourist destinations in terms of the business environment and infrastructure**

Country	TTCI	BEI	ATI	GTI	TI	ICT	PC
Austria	5.43	5.27	4.25	6.03	7.00	4.88	4.17
Germany	5.41	5.43	5.47	6.57	5.99	5.19	3.95
Spain	5.30	5.32	5.34	5.54	7.00	4.37	4.35
United States	5.28	5.58	6.34	5.45	6.74	5.23	4.16
United Kingdom	5.28	5.32	5.65	5.85	6.18	5.46	3.44
Canada	5.26	5.40	6.65	5.01	6.12	5.25	3.94
France	5.23	5.28	5.50	6.56	6.19	4.91	3.26
Hong Kong (China)	5.09	5.04	4.96	6.57	3.32	5.48	4.87
Portugal	5.09	4.83	4.19	5.03	6.32	4.24	4.36
Netherlands	5.01	5.11	4.85	6.35	4.68	5.89	3.78
Greece	4.92	4.63	4.62	4.39	6.67	3.61	3.84
Italy	4.84	4.77	4.43	4.51	6.88	4.57	3.49
Malaysia	4.63	4.31	4.18	4.95	3.19	3.37	5.89
Hungary	4.60	4.18	2.98	4.81	4.89	3.82	4.43
Croatia	4.59	4.32	2.96	4.05	6.63	3.72	4.26
Thailand	4.37	4.17	4.32	4.15	4.36	2.61	5.42
Turkey	4.19	3.73	3.71	3.79	4.00	2.97	4.19
Mexico	4.18	3.62	3.78	3.28	4.00	2.67	4.39
Poland	4.18	3.62	2.57	3.95	3.60	3.59	4.36
South Africa	4.11	3.85	3.79	3.89	3.94	2.53	5.08
China	4.06	3.45	3.98	3.80	1.53	2.62	5.30
Russian Federation	4.04	3.56	4.14	3.25	3.33	3.08	3.98
Egypt	3.96	3.47	3.06	3.43	2.79	2.15	5.89
Ukraine	3.76	3.24	2.44	3.24	3.54	3.06	3.94
Saudi Arabia	3.68	3.78	3.46	3.85	3.31	2.80	5.47

*Source: TTCI – Travel and Tourism Competitiveness Index; BEI – Business Environment and Infrastructure subindex; ATI – Air Transport Infrastructure subindex; GTI – Ground Transport Infrastructure subindex; TI – Tourism Infrastructure subindex; ICT – ICT infrastructure subindex; 10PC – Price Competitiveness in the travel and tourism industry subindex; Countries are ranked in the descending order of the TTC index.*

The average value, determined at the level of the group of considered countries, of 4.45, the **business environment and infrastructure** appears as one of the areas where the world's top 25

tourist destinations still have to make improvements. The hierarchy of the considered tourist destinations is led by the United States (with a score of 5.58), Germany (5.43), Canada (5.40), Spain and United Kingdom (both with 5.32). One-third of these destinations, particularly Ukraine (with an average score of 3.24), China (3.45), and Egypt (3.47), should take into consideration for their development the necessary improvements of the business environment and infrastructure.

Due to their strong association, the infrastructure of the information and communication technology ( $r = 0.90$ ), ground transportation infrastructure ( $r = 0.89$ ), air transportation ( $r = 0.84$ ), and tourism infrastructure ( $r = 0.78$ ) represent the pillars contributing the most to the overall competitiveness of the business environment and infrastructure. The price competitiveness of the travel and tourism industry ( $r = -0.49$ ) seems to be moderately but inversely associated with the competitiveness of the business environment and infrastructure, any increase in the price affecting the business environment and infrastructure competitiveness.

As in the case of the business environment and infrastructure, based on the average value determined at the level of the considered countries, of 4.59, the human, cultural and natural resources is another area where the world's top 25 tourist destinations should make improvements. United States (with an average value of 5.52), Spain (5.33), and United Kingdom (5.26) are leading the hierarchy of the world's top 25 tourist destinations in terms of the human, cultural and natural resources competitiveness while Saudi Arabia (3.43), Ukraine (3.51), and Egypt (3.86) are placed at its bottom.

Cultural resources represent the pillar with the strongest association with the overall competitiveness of the human, cultural and natural resources ( $r = 0.86$ ) while human resources ( $r = 0.64$ ) and natural resources ( $r = 0.52$ ) can be characterized through a rather moderate association. With a value of the correlation coefficient of  $-0.02$ , the affinity for travel and tourism seems to be almost not at all important for the overall competitiveness of the world's top 25 destinations in terms of the human, cultural and natural resources.

Table no. 4

**Major pillars of the travel and tourism competitiveness in the world's top 25 tourist destinations in terms of the human, cultural and natural resources**

Countries	TTCI	HCN	HR	ATT	NR	CR
Austria	5.43	5.16	5.62	5.45	4.00	5.59
Germany	5.41	5.13	5.50	4.74	4.26	6.01
Spain	5.30	5.33	5.34	4.99	4.19	6.80
United States	5.28	5.52	5.91	4.29	6.04	5.83
United Kingdom	5.28	5.26	5.87	4.54	4.35	6.28
Canada	5.26	5.07	5.79	4.76	4.78	4.96
France	5.23	4.85	5.50	4.62	3.61	5.67
Hong Kong (China)	5.09	4.31	5.83	5.70	3.30	2.42
Portugal	5.09	4.93	5.26	5.05	2.89	6.52
Netherlands	5.01	4.58	5.68	4.68	2.78	5.16
Greece	4.92	4.66	5.11	5.12	3.02	5.38
Italy	4.84	4.74	5.22	4.76	3.17	5.81
Malaysia	4.63	4.55	5.53	5.47	4.70	2.50
Hungary	4.60	4.21	5.03	4.33	2.74	4.75
Croatia	4.59	4.43	5.05	6.25	3.08	3.35
Thailand	4.37	4.49	4.98	5.51	4.63	2.83
Turkey	4.19	4.28	4.92	5.14	2.97	4.08
Mexico	4.18	4.62	5.05	4.59	4.44	4.43
Poland	4.18	4.42	5.18	4.06	3.72	4.72
South Africa	4.11	4.18	3.81	5.02	4.60	3.30
China	4.06	4.81	5.07	3.92	5.25	5.01

Russian Federation	4.04	4.35	4.93	4.32	4.58	3.57
Egypt	3.96	3.86	4.83	5.28	2.83	2.52
Ukraine	3.76	3.51	4.87	4.83	2.39	1.95
Saudi Arabia	3.68	3.43	4.82	3.99	3.75	1.16

*Source: TTCI – Travel and Tourism Competitiveness Index; HCN – Human, Cultural and Natural resources subindex; HR – Human Resources subindex; ATT – Affinity for Travel and Tourism subindex; NR – Natural Resources subindex; CR – Cultural Resources subindex; Countries are ranked in the descending order of the TTC index.*

With average values, determined at the level of the considered group of tourist destinations, the human resources (5.23) and the affinity for travel and tourism (4.86) are the pillars for which these destinations register values above while natural resources (3.84) and cultural resources (4.42) are the pillars associated with values below the average one expressing the competitiveness of the human, cultural and natural resources.

### **Conclusions**

The world's top 25 tourism destinations allows drawing the conclusion according to which these destinations do not form a homogeneous group. The average TTCI value for the selected countries may suggest that, although it is about the world's top tourist destinations, their travel and tourism competitiveness should be improved. The research illustrates the very strong association between the overall competitiveness and the business environment and infrastructure, as well as the strong associations between the overall competitiveness and the specific regulatory framework, respectively the human, cultural and natural resources.

The regulatory framework is a factor supporting the overall competitiveness of the world's top tourist destinations, but there are significant differences between these destinations in terms of the competitiveness of the regulatory framework. The associations between the specific pillars and the overall competitiveness of the regulatory framework is strong in the cases of the safety and security, environmental sustainability, health and hygiene, and policy rules and regulations, respectively moderate in the case of the prioritization of travel and tourism.

The business environment and infrastructure appears as one of the areas where the world's top tourist destinations still have to make improvements. Due to their strong association, the infrastructure of the information and communication technology, ground transportation infrastructure, air transportation, and tourism infrastructure represent the pillars contributing the most to the overall competitiveness of the business environment and infrastructure. The price competitiveness of the travel and tourism industry seems to be moderately but inversely associated with the competitiveness of the business environment and infrastructure, any increase in the price affecting the business environment and infrastructure competitiveness.

The human, cultural and natural resources represent another area where the world's top tourist destinations should make improvements.

Cultural resources represent the pillar with the strongest association with the overall competitiveness of the human, cultural and natural resources, while the affinity for travel and tourism seems to be almost not at all important for the overall competitiveness of the top tourist destinations in terms of the human, cultural and natural resources.

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