

COMPETITIVE POSITION OF SERBIA AS A TOURISM DESTINATION ON THE INTERNATIONAL TOURISM MARKET

Sonja Milutinović¹; Nevena Vasović²;

Abstract

Because of its economical and other effects which it has as an economic activity, tourism became a development chance for many countries, especially undeveloped and developing countries. Summing these positive effects, almost all countries in the world are trying to valorize their tourism potential, thereby offering different touristic products and services on tourism market. Despite the fact it has numerous and various potential for tourism development (favorable geographic position, specified relief and climate, various flora and fauna, numerous cultural and historical monuments and other), till now, Serbia has not achieved significant results in tourism development compared to the other tourism destinations, both in the region and in the world. The purpose of this paper is to analyze the competitive position of Serbia as a tourist destination on the international tourism market. In this paper we have used Index of Travel and Tourism competitiveness (The Travel & Tourism Competitiveness Index – TTCI).

Key Words: *tourism, tourism market, tourism destination, Serbia as tourism destination, competitive position*

JEL classification: Z30, L83

Introduction

Over the last few decades, tourism has an increasingly important role in economic and social life of many countries. As the fastest growing industry in the world, tourism is a significant driver of economic development of modern economies (Stanišić & Milutinović, 2016). The

¹ Sonja Milutinović, M.Sc., Teaching Assistant, University of Kragujevac, Faculty of Hotel Management and Tourism, Vojvođanska 5a, Vrnjačka Banja, Serbia, Phone:+381 32 515 0024; email: sonja.milutinovic@kg.ac.rs

² Nevena Vasović, M.Sc., Teaching Assistant, University of Kragujevac, Faculty of Hotel Management and Tourism, Vojvođanska 5a, Vrnjačka Banja, Serbia, Phone:+381 32 515 0024; email: nevena.vasovic@kg.ac.rs

tourism industry is a "crucial part" of the economy of each country, regarding its significant financial, political and social effects. It brings a number of benefits such as the generation of new jobs and GDP growth (Denda & Stojanović, 2016). According to WTTC data, tourism is one of the largest "industries" accounting for about 10.2% of world GDP with almost 292 million jobs (WTTC, 2017). Because of these and many other positive effects, almost all countries of the world have become aware of the importance of tourism for economic and social development, and strive to develop it. Considering that Serbia has a lot of quality resources for tourism development, it should become a driving force behind economic development and a factor of stabilization and growth of economic activity in Serbia (Dimitrovski & Milutinović, 2014). Radović-Stojanović & Vasović (2016) analyzed the number of foreign and domestic tourists for the period from 2001 to 2015 and they came to the result that the number of foreign tourists has an upward trend.

The aim of this study is to assess the competitive position of Serbia as a tourist destination on the international tourist market. During the time the different models for measuring the competitiveness of tourist destination were developed, but the most widely accepted of them and the most comprehensive is The Travel & Tourism Competitiveness Index developed by the World Economic Forum. Serbia is ranked in this index from 2008, although in 2007 competitiveness of tourism former state of Serbia and Montenegro was estimated. In this paper TTCI index will be used for the analysis of the competitive position of Serbia as a tourist destination.

This paper is organized as follows. After introduction there is section with the definition of the tourist destination term. In the third part we have defined and explained different models for measuring of competitiveness of the tourist destination. In the fourth part we have analyzed position of the Republic of Serbia in relation to its main competitors. Section five is conclusion.

The term of tourist destination

In the tourism literature there are different ways for defining the term of tourist destination. The concept of tourism destination comes from Latin word destination, which means vacation, goal of staying and resting in a room. The concept of a tourist destination is based on the concept of a tourist place, and in accordance to that we will first define this term.

Popescu (2011) defines it as a tourist destination city which attracts large number of tourists and tourism also gives a special characteristics to the place, and income from tourism has an important role in its functioning. The same author points out that the tourist destination is much more than a geographical area or city. Tourist destination includes a variety of products, services, natural resources, created elements and information which are able to attract a number of visitors.

We can define tourist destination as the place that has characteristics which are known to sufficient number OF visitors in order to justify its conception as an entity that attracts traveling, regardless of the attractiveness of other locations (Mathieson & Wall, 1990). Natural and created features, infrastructure characteristics, economic structure and properties of local destination residents, are of particular importance for the tourist destination. Pike (2008) defines tourist destination as special geographic region where visitors receive various ways of tourist experience. The author also states that a geographical area where there are more tourism resources can be considered as a tourist destination rather than the geographical area bounded by political borders.

We could conclude that tourist destination is place or area that might be of different sizes bigger or smaller than the territory of a country, region, island, town or village. Regardless of size, a tourist destination is an area that contains a variety of motives that attract the attention of tourists and through their common operations enable fulfilling of their needs.

Models for measuring the competitiveness of tourist destination

The competitiveness of tourist destination, as well as any other product or service, is of the great importance, because the success of tourist destination on the international tourism market depends on its competitiveness (Enright & Newton, 2004). The competitiveness of a tourist destination is based on its ability to increase tourist consumption, to attract more tourists, which will be achieved through satisfaction and the remembered experience by staying. At the same time, the competitiveness of tourist destination is based on how it will operate in a profitable manner, improving the welfare of the inhabitants of the place and preserving natural resources of the destination for future generations (Ritchie & Crouch, 2003). The competitiveness of tourist destination depends on its ability to deliver visitors experience that will provide more satisfactions than those offered in other destinations (Vengesai, 2003).

There are a lot of models for measuring competitiveness of the one tourist destination, and in this paper we will shortly present some of them. Among the first authors who have studied the nature and structure of competitiveness of tourist destinations were Ritchie & Crouch (2003). They started their researches in 1992 with the main aim to develop conceptual model based on the theory of comparative and competitive advantages. The model named *integrated model of destination competitiveness* received its final form in 2003. According to this model, the competitiveness of the destination is based on its inherited resources which are the basis of comparative advantage, as well as its ability to take advantage of these resources, which is the basis of competitive advantage. Their model includes five groups of factors (Ritchie & Crouch, 2003):

1. the key resources and attractions,
2. support factors and resources that provide the basis for development of the destination tourism industry,
3. policy, planning and development of destination with special emphasis on developing its competitiveness and sustainability,
4. destination management, whose task is to focus its activities on the implementation of the established tourism policies, to highlight the attractiveness and improve the quality and efficiency of support factors and resources of destination,
5. situational factors (location of destination, relation between cost and value, safety and security, interdependence of destinations, perception of destination, and its image and capacity carrying of destination).

In the model which was developed by Ritchie & Crouch (2003), there are certain meaningful restrictions. In fact, many destinations do not have databases required for decision-making according to this model. Also, the relationship between the competitiveness of destinations and the impact of global factors is set with the help of qualitatively determinants (Popesku, 2011).

Another model for measuring the competitiveness of the tourist destination is given by Dwyer & Kim (2010). In their integrated model all sources of competitiveness are interrelated and competitiveness of tourist destination is a tool to achieve social and economic well-being of inhabitants. Dwyer & Kim (2010) divided all resources in the inherited and created. Inherited resources cover naturals and cultural resources, while the created resources include tourism infrastructure, events, tourist activities, shopping and entertainment. There are also so-called contributory resources which include basic infrastructure, quality of

service, availability of destination, hospitality, various forms of market relationships that destination develop to guests in their country of origin (ethnic relations, common religion, culture and so on). Within the integrated model there are situational factors, which include: competitive micro environment, macro environment, safety and price competitiveness, the ability of the company in the destination to answer to the needs of the local market.

Destination management has an important role in the competitiveness of destination of the integrated model, where we can distinguish five types of management as follows: destination marketing management, planning and destination development, destination management organization, human resource development and environmental management.

Dwayer & Kim (2010) singled out the tourist demand as a special factor in the competitiveness of tourist destination. The authors emphasize three major elements of tourism: consumer awareness, consumer perception and their preferences. Consumer awareness can be formed in the different ways, for example through destination marketing activities, while the image of the destination may affect the perception of consumers and their visit to the destination.

If we compare these two models which have been given by Dwayer & Kim (2010) and Ritchie & Crouch (2003) we can observe that the first model is different from the second one in the following characteristics (Popesku, 2011):

1. It shows the interconnectedness between model elements, while the model of Ritchie & Crouch is linear;
2. There is a clear difference between created and inherited resources of tourist destination;
3. The element of tourism demand as an important factor in the competitiveness of a destination is extracted, while Ritchie & Crouch give importance only to offer. Also, in the first model the awareness of tourist about the destination and the products of destination plays an important role, which tourist compares with competing destinations;
4. Includes destinations policy, planning and development management, rather than segregating them as a separate group;
5. Makes clear differences between tourist and basic infrastructure;
6. Shopping is presented like important element of competitiveness.

In addition to these two models of tourist destination competitiveness a number of other models were formed. The model which have been used in our work is The Travel & Tourism Competitiveness Index (TTCI) and it was developed by World Economic Forum (WEF). This index has been published since 2007, every two years, and its main aim is to reveal the competitive advantages and disadvantages of tourism observed countries. Till 2015, TTCI contained three sub-indices, when the methodology was changed. Now TTCI contains four sub-indices. In the Table 1 and Table 2, the sub=indices for the old and new methodology are shown.

Table 1: *Structure of the index of competitiveness of tourist destination according to the WEF till 2015*

SUBINDEX		
REGULATORY FRAMEWORK	BUSINESS ENVIRONMENT AND INFRASTRUCTURE	HUMAN, CULTURAL, AND NATURAL RESOURCES
Policy rules and regulations	Air transport infrastructure	Human resources
Environmental sustainability	Ground transport infrastructure	Affinity for Travel & Tourism
Safety and security	Tourism infrastructure	Natural resources
Health and hygiene	ICT infrastructure	Cultural resources
Prioritization of Travel & Tourism	Price competitiveness in the T&T industry	

Source: *The Travel & Tourism Competitiveness Report (2013)*

Table 2: *Structure of index of the competitiveness od tourist destination according to the WEF from 2015.*

SUBINDEX			
ENABLING ENVIRONMENT	POLICY AND ENABLING CONDITIONS	INFRASTRUCTURE	NATURAL AND CULTURAL RESOURCES
Business Environment	Prioritization of Travel & Tourism	Air Transport Infrastructure	Natural Resources
Safety and Security	International Openness	Ground and Port Infrastructure	Cultural Resources and Business Travel

Health and Hygiene	Price Competitiveness in the T&T Industry	Tourist Service Infrastructure	
Human Resources and Labor market	Environmental Sustainability		
ICT Readiness			

Source: *The Travel & Tourism Competitiveness Report (2015)*

Each sub-index contains certain pillars of competitiveness, while competitiveness of each pillar is made up of a number of individual variables and quantitative data obtained from the various international organizations and professionals, such as: IATA, IUCN UNWTO, WTTC, UNCTAD, UNESCO (Blake & Chiesa, 2011). By the introduction of the new methodology in 2015, the index still contains 14 pillars, and pillars that have remained unchanged from the previous methodology are regrouped in accordance with the new structure of the sub-indices.

The competitiveness position of Serbia as a tourist destination

According to the World Economic Forum, all countries that have achieved the rank above 50th place can be considered as globally competitive tourist destinations. Taking that into account as well as the data in Table 3, we can conclude that Serbia as a tourist destination has an unenviable position in the international tourism market. From Table 3 we can see that the value TTCI index varied from year to year. Value of TTCI index is lowest in 2015 (3.34), when Serbia was ranked 95th in the world (out of 141 surveyed countries). The disturbing fact is that Serbia is ranked at the very end in Europe and occupies 35th place out of 37 surveyed countries (behind are Albania, Bosnia and Herzegovina).

Table 3: *Competitiveness Position of Serbia – European and global level*

	2009.	2011.	2013.	2015.
Index value	3,71	3,85	3,78	3,34
Europe	38/42	38/42	40/42	35/37
World	88/133	82/133	89/140	95/141

Source: *The Travel & Tourism Competitiveness Report (2009, 2011, 2013, 2015)*

In the following part of the work the values of sub-indices are presented, with the aim of detailed consideration of the competitive position of

Serbia as a tourist destination. In Table 4, sub-indices values for the period from 2009 to 2013 are given, while the values of the sub-indices for 2015, due to the changed methodology are given in Table 5.

Table 4: *The Travel & Tourism Competitiveness Sub-index for Serbia from 2009 to 2013*

SUBINDEX	2009.	2011.	2013.
REGULATORY FRAMEWORK	78	67	74
Policy rules and regulations	67	68	103
Environmental sustainability	127	124	115
Safety and security	85	66	55
Health and hygiene	44	41	46
Prioritization of Travel & Tourism	119	105	108
BUSINESS ENVIRONMENT AND INFRASTRUCTURE	80	84	81
Air transport infrastructure	105	111	110
Ground transport infrastructure	91	115	117
Tourism infrastructure	58	49	56
ICT infrastructure	63	62	49
Price competitiveness in the T&T industry	90	118	119
HUMAN, CULTURAL, AND NATURAL RESOURCES	96	94	109
Human resources	54	76	94
Affinity for Travel & Tourism	83	66	104
Natural resources	126	123	131
Cultural resources	64	59	65

Source: *The Travel & Tourism Competitiveness Report (2008, 2009, 2011, 2013)*

If we consider values of sub-indices from tables 4 and 5, we can observe that Serbia is the worst ranked in the fields of Natural resources and Environmental sustainability (according to the new methodology this pillar is called Business Environment). Taking this into account we can conclude that Serbia does not protect its natural resources sufficiently. Serbia also has a poor ranking when it comes to ground and air infrastructure, but it is encouraging that the rank of Serbia in these categories in 2015 is improved. On the other hand, Serbia has a very good ranking in the field of health and hygiene.

Table 5: *The Travel & Tourism Competitiveness Sub-index for Serbia for 2015*

SUBINDEX	2015.
ENABLING ENVIRONMENT	67
Business Environment	133
Safety and Security	59
Health and Hygiene	38
Human Resources and Labor market	89
ICT Readiness	56
POLICY AND ENABLING CONDITIONS	113
Prioritization of Travel & Tourism	113
International Openness	101
Price Competitiveness in the T&T Industry	78
Environmental Sustainability	72
INFRASTRUCTURE	81
Air Transport Infrastructure	102
Ground and Port Infrastructure	98
Tourist Service Infrastructure	63
NATURAL AND CULTURAL RESOURCES	122
Natural Resources	135
Cultural Resources and Business Travel	67

Source: *The Travel & Tourism Competitiveness Report (2015)*

In order to properly comprehend the competitive position of Serbia as a tourist destination at the regional and international tourism market, it is necessary to include its main competitors in the analysis. The Tourism Development Strategy of the Republic of Serbia (2016) listed as the main competitors of Serbia as a tourist destination the following countries: Slovenia, Croatia, Albania, Montenegro, Hungary, Romania, and Bulgaria. Analyzing the data from Table 6 we can see that Serbia substantially lags behind almost all its competitors (except in the case of Albania, where Serbia in two of the four taken years has a better competitive position). Among the studied countries, Croatia has taken the best position in 2015 with the TTCI index of 4.30, while Albania has the worst position with TTCI index of 3.22. Serbia is on a slightly higher level than Albania with TTCI index of 3.34. If we compare the last two analyzed years, we can note that almost all countries have improved their competitive position, except Hungary, which has retained the same rank and Montenegro, whose ranking has dropped from 33 to 26.

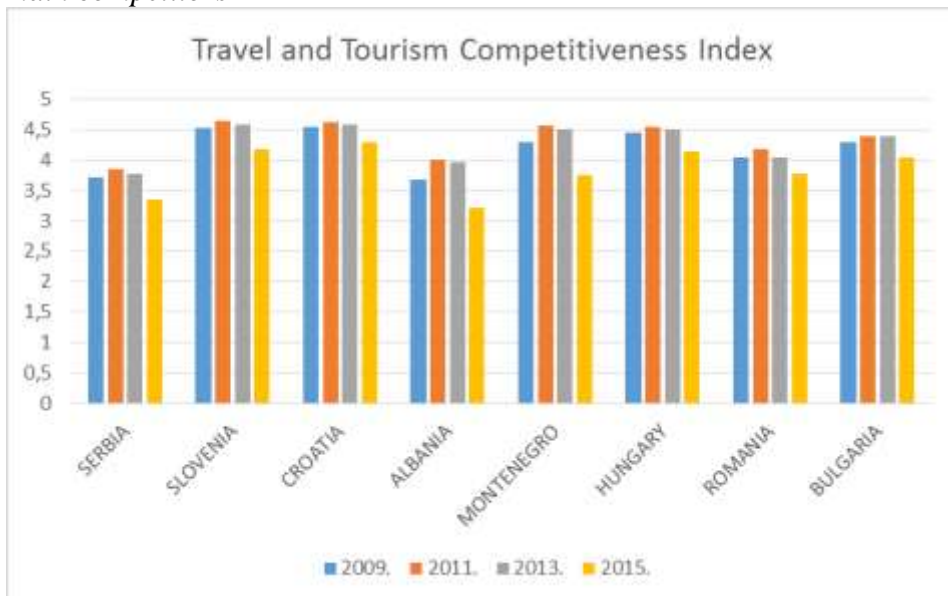
Table 6: *Comparative analysis of the competitive positions of Serbia and its main competitors*

YEAR	2009.	2011.	2013.	2015.
SERBIA				
Index value	3,71	3,85	3,78	3,34
Europe	38/42	38/42	40/42	3635/37
World	88/133	82/133	89/140	95/141
SLOVENIA				
Index value	4,53	4,64	4,58	4,17
Europe	24/42	23/42	24/42	23/37
World	35/133	33/133	36/140	39/141
CROATIA				
Index value	4,54	4,61	4,59	4,30
Europe	23/42	24/42	23/42	19/37
World	34/133	34/133	35/140	33/140
ALBANIA				
Index value	3,68	4,01	3,97	3,22
Europe	39/42	35/42	38/42	36/37
World	90/133	71/133	77/140	106/141
MONTENEGRO				
Index value	4,29	4,56	4,50	3,75
Europe	30/42	25/42	26/42	33/37
World	52/133	36/133	40/140	67/141
HUNGARY				
Index value	4,45	4,54	4,51	4,14
Europe	25/42	26/42	25/42	25/37
World	38/133	38/133	39/140	41/141
ROMANIA				
Index value	4,04	4,17	4,04	3,78
Europe	34/42	34/42	35/42	32/37
World	66/133	63/133	68/140	66/141
BULGARIA				
Index value	4,30	4,39	4,38	4,05
Europe	29/42	27/42	31/42	28/97
World	50/133	48/133	50/140	49/141

Source: *The Travel & Tourism Competitiveness Report (2009, 2011, 2013, 2015)*

In addition, on the Graph 1 we can see TTCI index for Serbia and its main competitors. As we can see from the graph, the value of TTCI index, in the case of all countries observed, decreases since 2011.

Graph 1: *The Travel & Tourism Competitiveness Index for Serbia and its main competitors*



Source: *The Travel & Tourism Competitiveness Report (2009, 2011, 2013, 2015)*

In order to perceive the effects of tourism on the observed country's economies, it is necessary to analyze the total contribution of the tourism industry in GDP (gross domestic product) and total contribution of the tourism employment in total employment of the country. The shares of the travel and tourism contributions, in percentages, are given in Table 7.

Among all observed countries, Croatia is the most recognized the significance of tourism for economic development. This is supported with the data that the share of tourism in the total GDP in the reporting year was always around 12%, while share of employees in the tourism industry was about 13%. Besides Croatia, Montenegro is the only country that has a higher tourism share of GDP and employment. However, in both leading countries there has been a decline in shares from 2008 to 2012, but already in 2014 a recovery of the tourism sector was recorded.

Table 7: *The share of travel and tourism (t&t) industry and employment of Serbia and its main competitors*

YEAR	2008.	2010.	2012.	2014.
SERBIA				
The share of t&t industry in GDP (%)	1.0	2.0	1.7	1.9
The share of t&t employment (%)	0.9	1.9	1.6	2.6
SLOVENIA				
The share of t&t industry in GDP (%)	2.4	2.6	3.5	3.6
The share of t&t employment (%)	3.3	3.5	3.9	4.0
CROATIA				
The share of t&t industry in GDP (%)	12.1	11.8	11.5	12.1
The share of t&t employment (%)	13.6	13.0	12.7	13.3
ALBANIA				
The share of t&t industry in GDP (%)	4.3	4.1	6.3	4.8
The share of t&t employment (%)	3.3	4.5	5.6	4.3
MONTENEGRO				
The share of t&t industry in GDP (%)	12.7	10.8	8.6	9.8
The share of t&t employment (%)	10.8	9.3	7.6	8.8
HUNGARY				
The share of t&t industry in GDP (%)	2.6	3.0	4.0	4.1
The share of t&t employment (%)	4.3	4.9	5.6	5.8
ROMANIA				
The share of t&t industry in GDP (%)	2.2	1.9	1.5	1.6
The share of t&t employment (%)	3.5	3.2	2.3	2.4
BULGARIA				
The share of t&t industry in GDP (%)	3.1	3.1	3.5	3.7
The share of t&t employment (%)	2.7	2.7	3.2	3.4

Source: *The Travel & Tourism Competitiveness Report (2009, 2011, 2013, 2015)*

When it comes to shares of GDP and employment, Serbia is at the very end, along with Romania. While Romania had higher values of selected contributions in the first observed years, their value declined in later years. In contrast, in the case of Serbia, the growth of the observed contributions was recorded in the last two years. These data are encouraging because it could mean that Serbia recognized the importance that tourism and its effects (direct, indirect and induced) could have on the country's economy.

Conclusion

Although it has some flaws (for example, all the determinants of competitiveness treated equally) TTCI index is a useful analytical tool for comparing the competitive position of two or more tourist destinations. Therefore TTCI index is used for analyzing the competitive position of Serbia as a tourist destination in this paper. First of all, we have analyzed indices and sub-indices for Serbia. During all observed years, the value of TTCI index is the lowest for last year, in 2015. In terms of ranking, Serbia occupies the 95th place in the world (out of 141 surveyed countries), while it is at the very end in Europe (35 of 37 countries surveyed). Regarding the sub-indices Serbia has the worst outcomes in the field of conservation of natural resources. In this paper we compare Serbia with its main competitors: Slovenia, Croatia, Albania, Montenegro, Hungary, Romania, and Bulgaria. The analysis shows that Serbia, with the exception of Albania, lags much behind its competitor destinations.

Despite of these poor results and rankings in Europe and in the world, Serbia has great potential to improve its position in the international tourism market. Tourism Development Strategy of the Republic of Serbia (2016) defines the tourism products that are of particular importance for the development of tourism in Serbia:

1. City tourism;
2. Events (cultural, sports, etc.);
3. Mountain tourism;
4. Spa & Wellness in Spas / Health Tourism;
5. Themed route;
6. Rural tourism;
7. Nautical tourism;
8. Meetings, incentive travel, conferences and exhibitions / events (MICE tourism);
9. Cultural heritage;
10. Special interests;
11. Transit tourism.

If Serbia takes adequate measures for supporting the development of existing and new products, improves the promotion in major markets, raises the effective of the destinations management, provides a quality level of permanent acquisition of new knowledge and skills and in that way exploits the development of transport infrastructure, tourism revenues (which are the largest from the foreign tourists) in Serbia, it will

be able to grow at a higher rate by 2025 (Tourism Development Strategy of the Republic of Serbia, 2016).

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