CRUCIAL ASPECTS OF IMPROVING NATIONAL COMPETITIVENESS

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TABLE OF CONTENTS

MEASURING DESTINATION COMPETITIVENESS: THE CASE OF MOUNTAINS IN THE REPUBLIC OF SERBIA

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Abstract:

The purpose of this work is to do a comparative analysis of the competitiveness of mountains in Serbia (Kopaonik, Zlatibor and Stara planina) as tourism destinations and explore the impact of key attributes on their competitiveness. The following methods are used in the paper: comparative and correlation analysis. Although the mountain that record the highest tourism traffic has a better competitiveness then other observed mountains, the results of the analysis indicate that it does not exist a significant correlation between tourism traffic and the tourism competitiveness of mountains in the Republic of Serbia. In the future, it is essential that the Serbia applies appropriate measures in order to increase competitiveness of observed mountains as tourist destinations. In the paper special attention was paid to use the appropriate methodology to identify the competitiveness of the surveyed mountains as tourist destinations. Based on the background of destination competitiveness theories, the survey was made with the aim to analyze the competition of mountains as tourism destinations. The findings suggest that the factors of destination competitiveness are different in importance.

Key words: mountain, competitiveness, tourist destination, tourism traffic, Republic of Serbia.

1. Introduction

The mountain tourism in Serbia has a relatively long tradition that it is related to the building of mountain huts, hunting and forestry houses. After II war the building of mountain huts, hunting and forestry houses were continued, but more and more are being built resorts for workers, children and youth. At the

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end of the sixties and early seventies of the XX century there was an important turning point in the tourism activation of the mountains. The building of the hotels IS beginning to intensify, so these hotels for more than two decades have the largest share in the total accommodation capacities of mountain tourism resorts. On one side, some circumstance at the end of the XX century had a negative influence on the economic and tourism development as well as on mountain tourism in the Republic of Serbia. On the other hand, the number of tourism destinations that offer their tourism products on the markets has constantly increased leading to intensifying competition. Destination competition has become one of the most important questions on the modern tourism market.

In the paper special attention was paid to the factors that influence on competition of mountains in the Republic of Serbia, i.e. factors that influence on competition of Kopaonik, Zlatibor and Stara planina. About that it should be noted that Kopaonik and Zlatibor represent tourism destinations that record the highest tourism traffic in relation to other mountains in the Republic of Serbia. Also, these mountains have developed infrastructure and tourism superstructure. Unlike them, Stara planina until represents undiscovered tourism potential. But there is certainly a possibility, if more investment will make in the infrastructure and tourism superstructure of this area, it would be one of the main competition mountain resorts.

The purpose of the paper is the analysis of the competitiveness of mountains as tourist destinations in the Republic of Serbia. The aim of the paper is to quantify and analyze factors that have the highest influence on competition observed mountains in the Republic of Serbia. For this purpose a survey was conducted. The results of this survey are analyzed in this paper. A theoretical overview of competitiveness models is given in the first part of this paper, whereby special attention is paid to the model which was formed by Ritchie and Crouch (2003). Based on the attributes of destination competitiveness within the framework of the observed model the survey is made. The results of this survey are analyzed in this paper with the aim of quantification of competition of observed tourism destinations. In the second part of this paper, special attention was paid to the selection of mountains that are subject of analysis. The selection of mountains is based on realized tourism traffic, i.e. the number of domestic and foreign tourists as well as number of tourism nights. In the third part of the paper, the results of the questionnaire were analyzed with the aim of quantifying the factors that influence the competitiveness of the observed destinations.

2. Theoretical backgrounds

2.1. The concept of destination competitiveness

The theory of competitiveness is old as well as the science discipline. The concept of competitiveness is widespread in the economic literature. The fundamental problem of this concept is related to better understanding of the ways in which competitiveness can improve economic well-being of the country and achieve more equitable distribution of wealth (Krstić and Krstić, 2015).

In that sense, the main problem is that there are a number of different definitions of competitiveness in the literature (Boltho, 1995). The researches define the competitiveness on the level of a country, company, or tourism destination. The concept of competitiveness at the country level was first introduced by Porter (1990), through the model of competitiveness of the national economy (Petrović, Milićević and Đeri, 2017, p. 1354). Porter gives a broad definition of competitiveness according to which a country's competitiveness is defined by the "productivity with which a nation utilizes its human, capital and natural resources" (Porter, 2005, p. 2). Also, a broad definition of competitiveness is given by Vuković (2013). He defined country's competitiveness as the skills of competition, the ability to take and retain market position, increase market share and profitability – therefore, the concept of competitiveness denotes business success (Vuković, 2013, p. 198). World Economic Forum defines competitiveness as "the set of institutions, policies, and factors that determine the level of productivity of an economy, which in turn sets the level of prosperity that the country can achieve"(World Economic Forum, 2016-2017, p. 4).

The main question that Porter attempts to answer is why some countries are more successful in particular industries than others. He identifies four classes of country attributes (which he calls the National Diamond) that provide the underlying conditions or a platform for the determination the national competitive advantage of a nation. These are factor conditions, demand conditions, related and support industries, and company strategy, structure and rivalry. He also proposes two other factors, namely government policy and chance (exogenous shocks), that support and complement the system of national competitiveness, but do not create lasting competitive advantages (Smith, 2010).

Understanding the concept of the tourist destination competitiveness implies the process of becoming familiar with the concepts of comparative and competitive advantages, which essentially determine the content of the competitiveness itself (Hassan, 2000). Comparative advantages are related to natural, as well as built destination resources. Porter (1990) groups the factors of production into five broad categories: human resources, natural resources, knowledge resources, capital resources and infrastructure. In the case of tourism and tourist destinations, it is necessary to add historical and cultural resources, as a separate category, and to expand the category of infrastructure to include also the tourism super structure (Ritchie & Crouch, 2003).

The tourism competitiveness is the concept that becomes very important for countries around the world in modern conditions. This fact is understandable, given that the development of the tourism sector can greatly affect the economic development of countries.

Competitiveness has been identified in the tourism literature as a critical factor for the success of tourism destinations. Today's global competition in tourism is no longer managed only by criteria of products and quality of tourism offer in the narrow sense. It is necessary to develop new methods and strategies to improve tourism. The precondition of improving tourism sector and the competitiveness of tourism is certainly assessment of the position of the specific country in the world tourism market firstly (Krstić, Stanišić and Petrović, 2015).

The fundamental importance of competition in tourism relies on the making quality products/services with attributes that will differentiate it or will make better then the products/services of the competition (Pavlović, 2016). To be competitive, tourism destination has to offer to the market a greater value than its competitors (Petrović, Milićević, 2015, p. 170). According to Ritchie and Crouch (2000) „the fundamental product in tourism is the destination experience", so destination competitiveness could be associated with the ability to deliver an experience that is more satisfying than that offered by other destinations (Vengesayi, 2003, p. 639). In order to ensure a competitive advantage, each destination has to ensure that its overall attractiveness and tourism experience are superior to other destinations. Development of a model of destination competitiveness and the appropriate set of indicators allow the interested tourism stakeholders (in the private and public sector) to identify key strengths and weaknesses of their destinations from the perspective of visitors, to highlight opportunities for tourism development, and to develop strategies to counteract possible future threats (Dwyer at all. 2004).

Despite its heightened attention, competitive advantage could be a "problematic concept". The main stream literature struggles with the vagueness of the concept reflecting a multiplicity of meanings, rendering applicability of the concept challenging. In summary, what makes a tourism destination truly competitive is its ability to increase tourism expenditure, to increasingly attract visitors while providing them with satisfying, memorable experiences, and to do so in a profitable way, while enhancing the well-being of destination residents and preserving the natural capital of the destination for future generations (Ritchie and Crouch, 2003, p. 2). Ritchie and Crouch (2000, p. 5) claim that, "Competitiveness is illusory without sustainability. To be competitive, a destination's tourism development must be sustainable, not just economically and ecologically, but socially, culturally, and politically as well." They define destination competitiveness as, "The ability to increase tourism expenditure, to increasingly attract visitors while providing them with satisfying, memorable experiences, and to do so in a profitable way, while enhancing the well-being of destination residents and preserving the natural capital of the destination for future generations" (Ritchie and Crouch, 2003, p. 2).

Furthermore, Dwyer and Kim (2003, p. 372) emphasize that the ultimate goal of a destination's competitiveness is "to maintain and increase the real income of its citizens, usually reflected in the standard of living of the country." Hassan defined competitiveness "as the destination's ability to create and integrate value added products that sustain its resources while maintaining market position relative to competitors". This also acknowledges the view of Muller (1994), Hunter (1995) and others who recognize that a competitive destination pursues and establishes the right balance on the following different objectives: optimum satisfaction of guest requirement, subjective well-being of the residents, economic health, unspoiled nature, and healthy culture.

Buhalis (2000) highlight the relationship between competitiveness and economic prosperity and the delivery of an experience that is more satisfying compared to other similar destinations. He identifies four main objectives for a competitive destination: enhance the long-term prosperity of local people; maximize visitors' satisfaction; maximize profitability of local businesses and generate multiplier effects; optimize tourism impacts.

2.2. Destination competitiveness theories: model of destination competitiveness

Tourism is one of the fastest-growing industries in many countries around the world, and the main source of foreign income for a significant number of developing countries. Tourism has become the leading leisure activity of the 21st century (Claver-Cortes, Molina-Azorin, & Pereira-Moliner, 2007). In 2017, UNWTO reported that international tourist arrivals in the world grew by a remarkable 7% to reach a total of 1.322 million. This strong momentum is expected to continue in 2008 at a rate of 4%-5% (UNWTO, 2018). Led by Mediterranean destinations, Europe recorded extraordinary results for such a large and rather mature region, with 8% more international arrivals than in 2016. Africa consolidated its 2016 rebound with an 8% increase. Asia and the Pacific recorded 6% growth, the Middle East 5% and the Americas 3%.

However, the tourism industry is becoming increasingly competitive as well (Middleton & Hawkins, 1998), and consumers have developed considerable flexibility in their choice of destinations. Following these developments, the recent literature has increasingly focused on measuring Tourism Destination Competitiveness (TDC) (Zhang et al., 2011; Hall, 2007; Pearce, 1997; Ruhanen, 2007; Enright and Newton, 2004; Kozak and Rimmington, 1999; Cracolici and Nijkamp, 2009). However, the role of tourism destination competitiveness in Serbia has received little attention to date.

Porter's diamond model of competitiveness was the basis for most models of destination competitiveness: Ritchie and Crouch (1993, 2003, 2010), De Keyser and Vanhove (1994), Chon and Mayer (1995), Cho and Moon, (2013); Heath (2002), Dwyer and Kim (2003), etc.

Competitiveness cannot be directly measured and studies have, therefore, had to use indicators for this objective primarily in the form of inputs and outputs. For the purpose of determining and comparing the competitiveness of the mountains as tourism destinations, it is not possible to apply indicator, such as Travel and Tourism Competitiveness Index (TTCI), but it is possible to use the models of Crouch (2007a; 2007b; 2011), Ritchie and Crouch (2003), and Kim and Dwyer (2003).

The TTCI was made by World Economic Forum. This index measures the set of factors and policies that enable the sustainable development of the Travel & Tourism sector, which in turn, contributes to the development and

competitiveness of a country. The TTCI is composed of three subindexes: the T&T regulatory framework subindex; the T&T business environment and infrastructure subindex; and the T&T human, cultural, and natural resources subindex. Each of these three subindexes is composed by a number of pillars of T&T competitiveness, of which there are 14 in all. Each of the pillars is, in turn, made up of a number of individual variables (The Travel & Tourism Competitiveness Report 2013). The approach of the World Economic Forum to measuring the competitiveness of tourist destinations is very similar to the approach by Gooroochurna and Sugiyarta (2005). Gooroochurn and Sugiyarto (2005) have developed a pragmatic model for measuring and comparing countries as tourist destinations on the basis of 23 indicators grouped into eight categories.

The model of destination competitiveness developed by Ritchie and Crouch (2003) is the most well-known conceptual model of destination competitiveness in tourism literature and has been the starting point for many other research studies about destination competitiveness. Their model recognises that destination competitiveness is based upon a destination's resource endowments (comparative advantage) as well as its capacity to deploy resources (competitive advantage). The model also acknowledges the impact of global macro-environmental forces (e.g., the global economy, terrorism, cultural and demographic trends, etc.) and competitive micro-environmental circumstances that impact the functioning of the tourism system associated with the destination. The model distinguishes 36 attributes of competitiveness classified into five main groups of factors: Supporting Factors and Resources; Core Resources and Attractors; Destination Management; Destination Policy, Planning and Development; and Qualifying and Amplifying Determinants. Each of these groups contains different attributes of destination competitiveness (Crouch, 2011). According to Crouch (2007b) the most significant attribute of destination competitiveness is "physiography and climate" while the next important attribute is "culture and history", followed by "tourism superstructure".

Crouch and Ritchie competitiveness model was a very good basis for the development of the integrated model of destination competitiveness developed by Dwyer and Kim (2003). The primary elements of their model include resources comprising endowed resources, both natural (e.g., mountains, coasts, lakes, and general scenic features) and heritage (e.g., handicrafts, language, cuisine, customs) resources; created resources (such as

tourism infrastructure, special events, shopping, etc.); and supporting resources (such as general infrastructure, accessibility, service quality, etc.). Destination management is the second core component of their model comprising government and industry. This model explicitly recognizes demand conditions as an important determinant of destination competitiveness (Petrović, Milićević and Đeri, 2017). Based on of Ritchie and Crouch (2000; 2003) and model of Dwyer and Kim (2003), the survey was made with an aim to analyze the competitiveness of mountains in Serbia as tourism destinations.

3. Analysis of tourist traffic in the mountains of Republic Serbia

Most often, the success of the tourism industry is measured by quantitative indicators such as number of domestic and foreign tourists and the number of realized overnight stays (Milićević and Petrović, 2017, p. 171). The largest number of overnight stays was recorded in 1990, followed by a tourism development, mountains due to their values are more attractive than others tourism destinations.

In the period from 2006 to 2016, there was an increase in tourist traffic in the Republic of Serbia. However, if we observe the total number of overnight stays recorded in the Republic of Serbia, as well as the number of overnight stays in certain types of destinations in the period from 1990 to 2016, it can be concluded that Serbia, as well as some types of destinations, have not yet achieved the level of tourist traffic recorded in 1990.

The spas are dominated in the total structure of overnight stays in our country during the observed period. Participation of spa tourism in total tourism nights in 2016 amounted to 27,7%. Mountain tourism has been considerably rising during last five years in the Republic of Serbia. The data in Table 1 confirm the significant role of mountain tourism in tourism traffic.

Mountain tourism in Serbia is characterized by the dominance of domestic tourists in tourism traffic, because the share of foreign tourists in the total number of tourists is about 18.5%, and the participation of overnight stays of foreign tourists in the total number of overnight stays is about 15%. About 80 mountain places are registered in the Republic of Serbia, but only in 30 tourism places were recorded tourism traffic.

Table 1 Number of overnight stays of tourists in Republic of Serbia in period 1990-2016

Year	Total	Main administrative centers	Spas	Mountains	Other tourism places	Other places
1990	11.647.000	2.291.600	3.494.200	2.728.300	2.455.700	677.700
Share in %		19,7%	30,0%	23,4%	21,0%	5,8%
1995	8.124.460	1.582.722	2.398.604	2.128.991	1.688.156	325.987
Share in %		19,5%	29,5%	26,2%	20,8%	4,0%
2000	7.689.187	1.393.521	2.509.702	2.024.261	1.520.177	240.526
Share in %		20,1%	31,0%	27,2%	19,1%	2,6%
2006	6.592.622	1.311.540	2.183.516	1.743.539	1.167.555	186.472
Share in %		19,9%	33,1%	26,4%	17,7%	2,9%
2011	6.644.738	1.362.578	2.308.435	1.590.016	1.172.675	211.034
Share in %		20,5%	34,7%	23,9%	17,7%	3,2%
2016	7.533.739	2.034.187	2.085.044	1.928.533	1.216.312	269.663
Share in %		27%	27,7%	25,6%	16%	3,7%

Source: The Statistical Office of the Republic of Serbia, http://www.stat.gov.rs/en-us/publikacije/

Table 2 Tourism traffic in mountains in Republic of Serbia in 2016

	Number of tourists	Overnight stays of tourists	Participation number of foreign tourists in total number of tourists	Participation of overnight stays of foreign tourists in total overnight stays
Kopaonik	117.942	495.753	17,3%	18%
Zlatibor	178.620	651.798	23,8%	18,4%
Tara	63.741	243.613	7,05%	5%
Divčibare	30.393	133.852	2,2%	1,1%
Stara planina	15.465	54.035	28,1%	24%

Source: The Statistical Office of the Republic of Serbia, http://www.stat.gov.rs/en-us/publikacije/

According to the tourism traffic, four mountains are dominated: Kopaonik, Zlatibor, Tara and Divčibare. Zlatibor records the highest number of tourists and overnight stays of tourists. Kopaonik is in the second place while Tara is on the third place. Kopaonik and Zlatibor will be the subject of analysis in this paper because they record the highest tourism traffic. Simultaneously, although Stara planina records the lowest tourism traffic in relation the

observed mountains; it records the highest participation foreign tourists in total number of tourists, as well as the highest participation overnight stays of foreign tourists in total number of tourists. For this reason, Stara planina will be also a subject of this analysis.

4. The data for the empirical case

Based on the model of Ritchie and Crouch (2000; 2003) and model of Dwyer and Kim (2003) the questionnaire was formed. Within the first stage, a survey on the sample of 50 tourism students was conducted, who rated the issues with a score from 1 to 5, from the standpoint of the significance of the factors for the destination competitiveness. Within the second stage, starting from the significance of factors of destination competitiveness, the new questionnaire was formed, containing 9 questions.

Table 3 Respondents' profiles

Attributes/distribution	Sample number	Frequency (%)
nder		
Male	87	44,6
Female	108	55,4
Age		
18 or younger	6	3,1
19-25	83	42,5
26-35	46	23,6
36-45	16	8,2
46-55	21	10,8
56-65	17	8,7
66 or older	6	3,1
Education		
Primary	5	2,6
Secondary	56	28,7
College	26	13,3
Faculty	105	53,9
Doctorate	3	1,5

Source: Prepared by the authors (SPSS Statistics 19)

The questionnaire contains two parts. Within the first part respondents rated (from 1 to 5) competitiveness factors from the aspect of their influence when they made a decision about visit to mountain, while within the second part respondents rated destination competitiveness of observed mountains. 210 respondents were survey in the period from the October to the December 2017. After elimination of questionnaires answers, we got a useful sample of

195 questionnaires. The Table 3 shows the characteristics of the respondents by gender, age and education.

5. Research methodology and hypothesis

This work relies on the following methods: comparative analysis and correlation analysis. Comparative analysis has allowed for the comparison of the level of tourism competitiveness, in respect of the mountains in the Republic of Serbia. Correlation analysis has examined the relationship between the tourism traffic and the tourism competitiveness of observed mountains.

The hypotheses to be tested in this study are the following:

H1: There is a correlation between tourism traffic (number of tourists and number of night tourists) and the competitiveness of the mountains as tourism destinations.

6. Results of empirical analysis

Based on the factors of destination competitiveness, the competition of observed destinations were quantified. The results of the survey are given on the Figure 1. Based on the results, it can be concluded that the most competitive mountain as a tourism destination is Zlatibor. Kopaonik is in the second place, while the Stara planina is on the third place.

Figure 1 Competitiveness mountains as a tourism destination
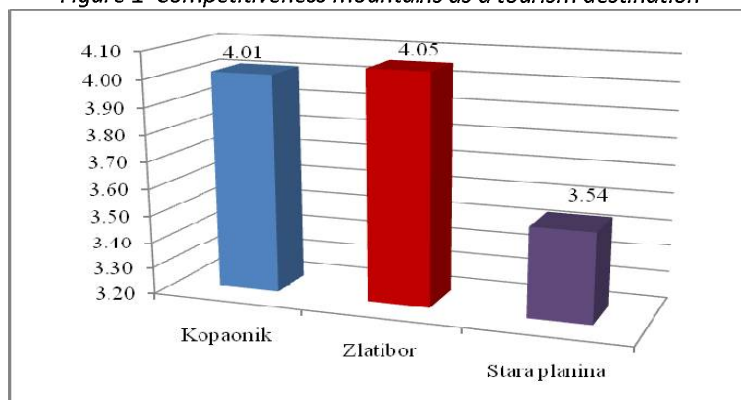
Source: Prepared by the authors (SPSS Statistics 19)

Starting from the main competitiveness factors, it can be concluded that the nature resources of Zlatibor and Kopaonik recorded by the highest score in relation to other observed factors. Their cultural and historical heritage recorded by lowest score while the cultural and historical heritage on Stara planina recorded by the highest score. It can be noted that perceptions of cultural and historical heritage was higher then expectations of cultural and historical heritage on Stara planina. Entertainment on Stara planina recorded by lowest score, followed by tourism tourism superstructure. If we look the factor service quality, it can be concluded that there is no significant difference between the observed mountains. The main problems of competitiveness of Stara planina as tourism destinations are: entertainment, tourism superstructure, special events and safety/security.

Table 4 – Tourists expectation and perception

Main competitiveness factors	Expectation	Perception		
		Kopaonik	Zlatibor	Stara planina
1. Nature resource	4,54	4,38	4,54	4,15
2. Cultural and historical heritage	3,51	3,32	3,63	4,46
3. Tourism superstructure	4,15	4,29	4,11	3,09
4. Special events	3,40	3,66	3,66	3,18
5. Entertainment	4,16	4,28	4,04	2,79
6. Infrastructure	4,18	3,95	4,08	3,37
7.Hospitality	4,41	4,12	3,97	3,48
8. Safety/security	4,43	4,04	4,35	3,21
9. Services quality	4,34	4,09	4,10	4,10

Source: Prepared by the authors (SPSS Statistics 19)

Correlation between the tourism traffic and tourism competitiveness in the observed mountains was tested by calculating the Pearson correlation coefficient between the number of tourists and the level of tourism competitiveness and between the number of night of tourists and the level of tourism competitiveness. Results of the correlation analysis are shown in Table 5.

When Sig. value is less than 0.05, the variable has a significant and unique impact on the predictability of the dependent variable. When this value is higher than 0.05, it must be concluded that this variable does not have a significant and unique impact on the predictability of the dependent variable. Based on the results of correlation analysis, it can be concluded that there is no significant correlation between tourism traffic (number of tourists and number

of tourist nights) and tourism competitiveness, since the value of Sig. is greater than 0.05.

Table 6 Pearson's correlation coefficient - the interdependence between the tourism traffic and tourism competitiveness

		Tourism competitiveness	Number of tourists	Number of tourism nights
Tourism competitiveness	Pearson Correlation	1	.953	.983
	Sig. (2-tailed)		.195	.117
	N	3	3	3
Number of tourists	Pearson Correlation	.953	1	.993
	Sig. (2-tailed)	.195		.078
	N	3	3	3
Number of tourism nights	Pearson Correlation	.983	.993	1
	Sig. (2-tailed)	.117	.078	
	N	3	3	3

Source: Prepared by the authors (SPSS Statistics 19)

6. Conclusion

The paper has paid special attention to the analysis of competitiveness of mountains in the Republic of Serbia as tourism destinations. A compare analysis of tourism traffic and destination competitiveness has led to the conclusion that Zlatibor is the leader both in terms of the tourism traffic and in the field of competitiveness as tourism destinations. Correlation analysis between the tourism traffic and competitiveness of the mountains as tourist destinations has indicated that there is no significant impact of the level of competitiveness on tourism traffic of the mountains as tourist destinations.

The diversity and the number of mountains are favorable for the development of mountain tourism in the Republic of Serbia. Serbia has significant opportunities for the development of tourism in the mountains. The most visited winter mountain center of Serbia is Kopaonik, which has the most developed offer for winter sports, but also a varied summer sports and recreational offer. Stara Planina has great potential to become a major ski destination, but additional infrastructure and tourist offer is needed. Zlatibor offers a passive vacation, primarily intended for families with children, while for serious adventurers Tara offers a lot of possibilities, such as hiking or mountain

biking, but it is certainly necessary to develop an additional tourist offer in order to increase the number of tourists.

But, natural resources and cultural and historical heritage are not enough that one mountain becomes an attractive and competitive tourism destination. First of all, investments are needed, in infrastructure and tourism superstructure.

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