

Competitiveness of Serbia as a Tourist Destination – Analysis of Selected Key Indicators*

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Abstract: To achieve the favourable competitiveness position, tourist destination has to offer quality experiences to tourists that can make the destination more attractive compared to other tourist destinations. The role of destination management is to exploit and develop existing resources by using clear and effective strategies for developing tourism products and creating additional value of tourist experience. The first step of analysis is to define destination competitiveness by using the indicators which will review and give the guidelines for improvement of competitive position.

This paper discusses the tourist destinations' competitiveness and indicators for its measurement with a special reference to Serbia. Tourism development of Serbia is a big chance for overall economic development of the country. Current competitive position of Serbian tourism on international market is not satisfactory and this paper is trying to analyse and to point out the reasons of Serbia's tourism low competitiveness.

Conclusions about the competitive positioning of Serbia as a tourist destination are drawn out firstly based on the relevant studies as well as on the Serbian Tourism Development Strategy. The results of Travel and Tourism Competitiveness Index (WEF TTCI) reports for Serbia are also presented. Based on own research, this paper is also showing the results related to competitiveness of Serbia as a tourist destination in terms of two groups of indicators: natural, cultural and historical resources as well as destination management. According to the results, Serbia is more competitive in its natural, cultural and historical resources comparing to the role of destination management.

Keywords: tourist destination; destination competitiveness; competitiveness indicators; competitiveness models, competitiveness measurement, Serbia.

1. INTRODUCTION

Contemporary tourism market directs tourist destination towards creating unique and innovative travel experiences in order to constantly keep and improve its competitive position. Destination management's task is to define the comparative advantages and to transform them into competitive advantages by applying appropriate development strategies. Serbia, as a tourist destination, has some comparative advantages, particularly in the resource base. In relation to this important issue, the role of destination management in Serbia is to achieve favourable competitive position. Having this in mind, the fundamental questions are following: What is the importance of tourist destination competitiveness measurement? What are the biggest disadvantages of competitiveness of Serbian tourism? What is the state of its natural, cultural and historical resources? What activities of the destination management will lead to achieving the competitive position?

This paper is divided into four key parts. Introduction discusses the concept of tourism destinations' competitiveness as well as the key contemporary models for measuring the competitiveness of tourism destinations. The second part reviews the literature on tourism destination competitiveness as well as tourism destination competitiveness' models and indicators. The third part presents some of the important analysis of the competitive position of Serbia as a tourist destination, with the special emphasis on the WEF Travel & Tourism Competitiveness Index. The fourth part reviews the research of Serbia competitiveness indicators: natural, cultural and historical resources indicators and role of management in the overall tourism development and competitiveness of Serbia as a tourist destination. This research was part of a wider study of the competitiveness indicators. The aim was to define the basis for the creation of a developed model of Serbia's competitiveness as a tourist destination.

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2. OVERVIEW OF LITERATURE ON DESTINATION COMPETITIVENESS

Competitiveness among tourist destinations is seen as a form of expressing the wider phenomenon – new competitiveness in the field of economy in the XXI century (Asch and Wolfe, 2001). The concept of the countries' competitiveness was introduced by M. Porter. The model of competitiveness introduced by the same author was based on the national competitiveness diamond and it served as the basis for many of tourism destinations' competitiveness models.

Addressing the issue of tourist destinations' competitiveness is based on the fact that experience gained by tourists in a tourist destination is a fundamental product in tourism. The aim of the tourist travel for each participant is achieving the desired or expected experience, namely an internal feeling caused by something that tourist personally saw, lived and experienced. In this way the travel represents a tool, an "event" that is attractive itself. On the other hand, the competitiveness of tourist destinations is linked to their capability to deliver tourist experiences that bring greater satisfaction to tourists compared to competitive destinations (Vengesayi, 2003).

For the destination, delivering and engineering the experience involves infrastructure, narrative content and a context, each of which are heightened by technology. In effect, engineering these experiences demands that destinations and operators migrate to experience-oriented strategies, where the common thread is authenticity, delivering experiences that are perceived to be real, unsullied and rooted in the destination (Cooper and Hall, 2013, p. 27)

Having this in mind, the competition in tourism is primarily focused on tourist destination. The competition exists, of course, also among the products of the individual tourism companies, but this competition is derived and dependent on the choices made by tourists in comparison to alternative tourist destinations (Ritchie and Crouch, 2000).

In order to operationalize and implement the concept of tourism destinations' competitiveness it is necessary to consider the basis of comparative advantage, and afterwards also the more complex elements that make up the concept of competitive advantage. It should be borne in mind that maintaining the competitiveness of tourist destinations requires a systematic examination of the uniqueness of comparative advantage, which provides a special long-term attraction in selected market segments (Hassan, 2000).

Comparative advantage is based on the richness of the factor conditions. They are usually grouped in five main groups: human resources, natural resources, knowledge resources, capital resources and infrastructure (Porter, 1990). 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 and Crouch, 2003, p. 20).

Tourist destination competitiveness is actually based on its inherited resources, which make the base of the comparative advantage, as well as on its abilities to use inherited resources, which make the foundation of the competitive advantage (Crouch and Ritchie, 1999; Ritchie and Crouch, 2000; Ritchie and Crouch, 2003).

Factor conditions can be seen as an inherited (e.g. natural factors) and created (e.g. infrastructure) factors and they serve as tools to achieve competitiveness, which is by the certain processes transformed into economic outcomes that may result in increased competitiveness. Consequently, it can be concluded that the competitiveness of tourist destinations is achieved by resources and processes.

Factor conditions, or resources, are of a great significance for achieving the long-term competitiveness of tourism destinations. They can be changed over the time and thus comparative advantage is changed. For the tourist destination it is important to preserve resources (both renewable and non-renewable) on which it can build its competitive position and to use strategies that are based on the human resources' training, protection of the natural heritage, enhancing of knowledge and creation of local knowledge resources, investments and capital growth, building and maintenance of infrastructure and tourism super structure as well as nurturing and preserving historical and cultural heritage.

Comparative advantages can serve as the basis for achieving a competitive advantage because comparative advantage implies resources available in a destination, while competitive advantage refers to the ability of destinations to use those resources effectively and in the long term (Ritchie and Crouch, 2003, p. 23). Through the objective of achieving the competitive advantage tourist destination decides on how it will use its comparative advantages. In other words, a tourist destination chooses the way in which it will engage and use the existing wealth of its Factor conditions.

Forms of tourism destination competitiveness can be overviewed in a relation to the multi-dimensional nature of the factors that define the strength of the market position of tourist destination. Competitiveness of tourism destinations has multiple meanings and can be seen as: economic, political, socio-cultural, technological and environmental. Basically, we are talking about possible types of response of tourist destination to the various forms of very strong influences from the macro marketing environment (Popesku, 2013, pp. 50-57).

There are many models of tourist destination competitiveness that are used also to present the specific level of competitiveness. Some of the models are designed only for the purpose of measuring the competitiveness of specific tourist destinations, which caused the fact that they could not be accepted as general models for measuring the competitiveness of tourism destinations. The first models predominately relied on Porter's diamond model of competitiveness, which represented the model of the competitiveness of the national economy and was related primarily to the economic competitiveness (Porter, 1990). After these, it is necessary to emphasize the defining of principles of competitive success (Poon, 1993) as well as the creation of an integrated model of destination competitiveness (Dwyer and Kim, 2003).

All competitiveness models are based on the usage of the certain competitiveness indicators that make up the basis of these models. These indicators have to possess certain characteristics in order to be used in the analysis of particular phenomena – they should be above all relevant, and well-placed, in order to provide fully, and in the best way, the basis for making judgments about the analysed problem. In addition, the indicators should be easy to understand in order to be accessible to the wide range of users, as well as reliable and based on credible information in order to be a basis for the final evaluation of the competitiveness.

Indicators of tourist destinations' competitiveness can be categorized into two basic groups, related to the possibility of their relatively precise quantitative determination. The first group includes objective indicators of competitiveness, and their main characteristic is that they can be expressed in numbers, while the second group includes subjective indicators that are related primarily to perceptions of tourists and are therefore primarily qualitative (Dwyer and Kim, 2003).

Poon (1993, p. 294) established four key principles of competitive success that destinations should seek in order to become more competitive:

- put the environment first;
- make tourism a leading sector;
- strengthen the distribution channels in the marketplace; and
- build a dynamic private sector.

Keyser and Vanhove (Keyser and Vanhove 1994) developed a model of competitiveness by analysing the competitive position of eight destinations in the Caribbean, setting apart the five key competitiveness indicators of tourist destinations: macroeconomic indicators, supply, demand, transport and policy. Go and Govers (1999) measured the competitiveness based on the seven attributes: facilities, accessibility, quality of service, overall affordability, location image, climate and environment, and attractiveness.

Kim's model (Kim and Lee, 2005) measures the competitiveness by dividing the indicators into primary, secondary, tertiary and fourth sources of competitiveness (resultant sources of competitiveness). Ritchie and Crouch began the development of their competitiveness model in 1999. This model has been supplemented over the years with a number of factors in order to get its final form in 2003 (Ritchie and Crouch 2003). On one side of this model there are comparative, and on the other side there are competitive advantages. This model defines two environments: global (macro) environment, consisting of many factors that are parts of a larger system - economic, technological, social, cultural, ecological, political and demographic factors, and competitive (micro) environment made up of organizations, influences and forces that lie within the destination's immediate arena of tourism activities and competition (Ritchie and Crouch 2003). This model emphasises the following indicators: Supporting factors and resources, Core resources and attractors, Destination management, Destination policy, Planning and development, Qualifying and amplifying determinants. (Crouch, 2006, p. 7)

Ritchie and Crouch competitiveness model was a very good basis for the development of the integrated tourist destination competitiveness model developed by Dwyer and Kim (2003). In relation to the Ritchie and Crouch model, integrated model introduced a demand as a special characteristic of competitiveness. Also, this model divided the resources into inherited and created. The main characteristic of this model was that it showed the interaction among all sources of destination competitiveness.

As a special model, we can stress the World Economic Forum Travel and Tourism Competitiveness

Index (TTCI). Analysis of competitiveness in tourism, carried out so far, are presented in reports for years 2007, 2008, 2009, 2011 and 2013 (Blanke and Chiesa, 2007, 2008, 2009, 2011, 2013).

Travel and Tourism Competitiveness Index includes many indicators that are evaluated as important for assessing the level of competitiveness of a destination. The index itself consists of three sub-indices, each of which contains elements and indicators that are the main indicators of competitiveness (Blanke and Chiesa, 2011):

1. T&T regulatory framework sub index;
2. T&T business environment and infrastructure sub index; and
3. T&T human, cultural, and natural resources sub index

Specific competitiveness indicators are classified into one of this three groups and they are related to the development policy of tourism industry, tourism operators, general and tourism infrastructure, as well as to the indicators, or destination elements, that are the basis and the backbone for tourism development and the creation of the destination's competitive position (natural, cultural and human resources). Each of these elements is evaluated separately and is included in one of the three sub-indices that together form the general Travel and Tourism Competitiveness Index.

TTCI should be understood as a useful analytical tool that can point to the important indicators for the comparison with competing tourist destinations. The quality of results depends primarily on the data that are used for the analysis. In this process some problems may occur, especially related to the direct information resources from specific destinations. Some of the problems were noted by G.Crouch, highlighting the issues of the scientific basis of the TTCI and the comparability of the concepts of national competitiveness in tourism (Crouch, 2007). In addition, the relevance of certain factors, which are important for determining the competitiveness index, is dependent

on the degree of development of a specific country or tourist destination (Dwyer, Forsyth and Dwyer, 2011).

Competitiveness indices for these four years indicate the relative disparity of information, namely they indicate the significant variations by year related to individual sub-indices, which can be illustrated by the example of Serbia that will be discussed separately.

3. SERBIA TOURISM COMPETITIVENESS INDEX

Review of competitiveness of Serbia as a tourist destination requires a comprehensive analysis, with the participation of a number of criteria and indicators. One of the conclusions on the competitive positioning of Serbia as a tourist destination is given in the study, drawn in 2003 (Krupka and Zečević, 2003), which dealt with the formulation of the basis for a comprehensive tourism development policy in Serbia. According to the opinion presented in this study, the tourism product of Serbia was very fragmented; there were not unique Serbian tourism resources, so Serbia had to use its geographical position as a competitive advantage in the scope of the regional long-term socio-economic development. As the basic weaknesses of the competitive position of Serbia it was stated that understanding of the competition and its effects was limited and that there was a lack of a clear definition of what Serbia truly wanted to be on the international market. On the other hand, the main challenge in this respect was the inability of the transformation of the socio-economic development results into a successful tourist activity (Krupka and Zečević, 2003).

The first more comprehensive estimation of the competitiveness of tourism in Serbia was done in the framework of the Tourism Development Strategy of Serbia. It was done, firstly, on the basis of opinion survey of the representatives of local stakeholders related to tourism and, secondly, on the basis of the evaluation of the achieved level of tourist product quality in Serbia in respect to the key success factors (Horwath

TABLE 1. Competitiveness of Serbia – global and European level

	2013	2011	2009	2008
Rank (World)	89/140	82/139	88/133	78/130
Rank (Europe)	40/42	38/42	38/42	37/42
Index value	3,78	3,85	3,71	3,76

NOTE. These data are obtained from the WEF TTCI report for 2013, 2011, 2009, and 2008 (Blanke and Chiesa, 2013, 2011, 2009, and 2008)

TABLE 2. Key indicators of tourism competitiveness of Serbia in 2008, 2009, 2011 and 2013

	Overall Rank			
	2013	2011	2009	2008
OVERALL INDEX	89	82	88	78
T&T REGULATORY FRAMEWORK	74	67	78	73
1. Policy rules and regulations	103	68	67	59
2. Environmental sustainability	115	124	127	128
3. Safety and security	55	66	85	76
4. Health and hygiene	46	41	44	46
5. Prioritization of Travel and Tourism	108	105	119	114
T&T BUSINESS ENVIRONMENT AND INFRASTRUCTURE	81	84	80	72
6. Air transport infrastructure	110	111	105	92
7. Ground transport infrastructure	117	115	91	86
8. Tourism infrastructure	56	49	58	52
9. ICT infrastructure	49	62	63	57
10. Price competitiveness in T&T industry	119	118	90	82
T&T HUMAN, CULTURAL AND NATURAL RESOURCES	109	94	96	88
11. Human resources	94	76	54	45
12. Affinity for Travel and Tourism	104	66	83	98
13. Natural resources	131	123	126	112
14. Cultural resources	65	59	64	52

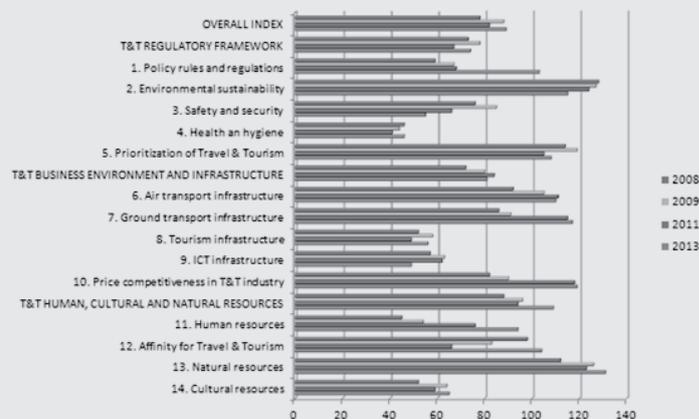
NOTE. These data are obtained from the WEF TPCI report for 2013, 2011, 2009, and 2008 (Blanke and Chiesa, 2013, 2011, 2009, and 2008)

Consulting and Faculty of Economics, 2005). In accordance with the views of respondents, Serbia's competitiveness as a tourist destination was scored 3.1 on a scale from 1 (very poor) to 6 (excellent). On average, the worst elements of Serbia as a tourist destination, according to the responders, were river tourism (1.7), signs for tourists (2.4), information and presentation (2.6), tourism legislation and legislative basis (2.6),

availability and transport (2.8) and communal infrastructure (2.9). On the other hand, the best average grades received belonged to the social elements and human resources (3.9), restaurants (3.8), and natural and cultural heritage (3.7) (Horwath Consulting and Faculty of Economics, 2005).

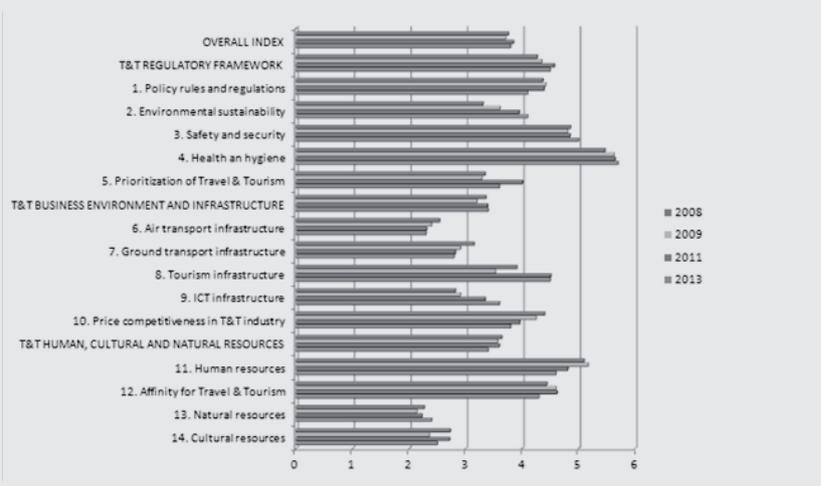
In order to analyse the competitive position of Serbia as a tourist destination, the TPCI data for 2008,

FIGURE 1. TPCI Comparative Score Analysis for Serbia in 2008, 2009, 2011, 2013 – overall index



NOTE. These data are obtained from the WEF TPCI report for 2013, 2011, 2009, and 2008 (Blanke and Chiesa, 2013, 2011, 2009, and 2008)

FIGURE 2. TTCI Comparative Score Analysis for Serbia in 2008, 2009, 2011, 2013 – index score



NOTE. These data are obtained from the WEF TTCI report for 2013, 2011, 2009, and 2008 (Blanke and Chiesa, 2013, 2011, 2009, and 2008)

2009, 2011 and 2013 can be used only, since in 2007 the TTCI was given for the State Union of Serbia and Montenegro.

Serbia as a tourist destination has a particularly poor competitive position within Europe, where only Bosnia and Herzegovina and Moldova have lower competitive position (Blanke and Chiesa, 2013).

The causes of Serbia's competitive position could be more precisely observed on the basis of the analysis of some competitiveness indicators given in the TTCI methodology.

Serbia has a particularly poor competitive position in the following indicators: natural resources, price competitiveness in travel and tourism industry and environmental sustainability. These indicators can be seen also in the following (Fig. Nr. 1)

Based on the assessment of the competitiveness index on a scale from 1 to 7, it can be seen more detailed how the specific indicators are deployed and what are the areas that cause the competitive position of tourism in Serbia.

Competitiveness of Serbia as a tourist destination, based on the WEF competitiveness indicators, can be compared also with key competitor countries. The competitive set is possible to reach by external benchmarking of Serbia as a tourist destination, as well as by functional benchmarking, which involves not only the comparison with direct competitors, but also with the best similar destinations that have the leading position on the tourism market.

The criteria and characteristics of the destinations that could be used to determine the competitive set

TABLE 3. Competitiveness of Serbia in relation to the defined competitive set

Country	Overall Index (Rank/Score)	T&T Regulatory Framework (Rank/Score)	T&T Business Environment and Infrastructure (Rank/Score)	T&T Human, Cultural and Natural Resources (Rank/Score)
	2013	2013	2013	2013
Czech Republic	31/4,77	28/5,24	37/4,49	28/4,61
Slovenia	36/4,58	33/5,12	35/4,52	52/4,11
Hungary	39/4,51	26/5,29	49/4,16	54/4,08
Poland	42/4,47	49/4,92	58/3,94	32/4,56
Bulgaria	50/4,38	58/4,79	45/4,24	53/4,10
Slovak Republic	54/4,32	43/4,96	60/3,92	55/4,06
Romania	68/4,04	66/4,61	68/3,67	73/3,85
Serbia	89/3,78	74/4,50	81/3,40	109/3,45

NOTE. These data are obtained from the WEF TTCI report for 2013(Blanke and Chiesa, 2013)

for Serbia as a tourist destination can be defined as follows: countries of the Central and Eastern Europe, which are to some extent new destinations (emerging), with similar geographical features and natural and cultural resources and with the tourism products that are competing to tourism products in Serbia. According to these criteria, the competitive set for Serbia as a tourist destination would be consisted of the following countries: Bulgaria, Hungary, Poland, Romania, Slovakia, Slovenia and the Czech Republic (Popesku, 2011, p. 291).

In order to compare Serbia with the countries that make up the competitive set it is possible to use the WEF competitiveness indicators for year 2013, taking into account both the overall competitiveness index and the three main sub-indices.

From these data it is clear that Serbia lags largely behind its competitors and that by all indicators it is behind all the countries that make up the competitive set.

It is evident that the importance of different factors that are contained in the TTCI varies depending on the level of development of each country (Dwyer et al., 2011). By examining of the TTCI it can be concluded that the developed countries are better ranked than developing countries. It may be noted that the TTCI favours developed economies, and it does not sufficiently reflect the progress achieved in developing countries (Kesterand Croce, 2011).

However it can be essential for Serbia to use this Index in the assessment of its position in the international market, but more precise analysis requires additional research, such as those which would determine the relative importance of different attributes of competitiveness (Zečević, 2011).

In order to make additional research with more comprehensive analysis of the competitive position of

Serbia as a tourist destination, some of the key competitiveness indicators were analysed, based on survey.

4. SURVEY: MEASURING OF SELECTED COMPETITIVENESS INDICATORS OF SERBIA AS TOURISM DESTINATION

Primary goal of the survey was to compare competitiveness factors of Serbian tourism which scores are substantially different. Namely, it was important to compare indicators of natural and historical resources in relation to indicators related to destination management. Primary reason is to compare results of TTCI to the results of study done in the framework of the Tourism Development Strategy of Serbia in order to establish the proper place of both indicators in relation to overall competitiveness index.

For the defining of indicators, the Ritchie and Crouch model was used, as well as the integrated model of competitiveness that was set up Dwyer and Kim. For the purposes of measuring, two narrow groups of indicators were defined. The first group consisted of indicators of natural and cultural and historical resources, while the destination management was assessed in the second group of indicators. The research started with the following general hypothetical statement: "Serbia is more competitive in the field of natural, cultural and historical resources than in the field of destination management"¹

The indicators were tested by using the scores that were given by 55 respondents who were divided into

¹ The research is a result of studies on a doctoral dissertation: Pavlović, D. *Competitiveness indicators of tourist destinations, with special emphasis on Serbia*, Singidunum University, 2009-2013, supervisor J. Popesku, PhD

TABLE 4. Natural, cultural and historical resources as indicators of competitiveness of Serbia

Index	Indicator	Total no.	Mean	SD
R1	Climate	55	3.2545	0.8214
R2	Natural environment (protected nature)	55	4.1091	0.6287
R3	Flora and fauna	55	3.7818	0.9167
R4	National parks and natural reserves	55	4.3273	0.7948
R5	Historical monuments	55	4.1818	0.6963
R6	Architecture	55	3.2000	0.9699
R7	Cultural heritage	55	4.2364	0.6657
R8	Folk traditions	55	4.2000	0.8255
R9	Level of hygiene and cleanliness	55	1.6909	0.9403

NOTE. Mean – arithmetic mean (scale 1 to 5) SD – standard deviation. Data were obtained on the basis of the survey conducted in the summer of 2009

TABLE 5. Indicators of destination management

	Indicator	No.	Mean	SD
DM1	Attracting (investing) of foreign capital in tourist areas	55	2.6000	1.1801
DM2	Participation of the government in the tourism professionals' education	55	2.9455	1.1929
DM3	Participation of the industry in the tourism professionals' education	55	2.9091	1.3371
DM4	Quality and suitability of the educational system in tourism	55	3.4545	1.0509
DM5	Quality of the educational structure of tourism employees	55	3.0727	1.1996
DM6	Active participation of the government in the creation of tourism product	55	2.7636	1.2013
DM7	Research for the purposes of tourism policy and planning	55	2.7636	1.1216
DM8	Compliance of tourism development with overall national development	55	2.6727	1.1231
DM9	Compliance of tourism development with the needs and demands of local population	55	2.7091	1.2572
DM10	Compliance of tourism development with the needs and demands of capital	55	2.9455	1.0438
DM11	Compliance tourism development with the needs and demands of society	55	2.7818	1.0834
DM12	Compliance tourism development with the needs and demands of tourists	55	2.8545	1.2083
DM13	Awareness of the government on the importance of long-term sustainable tourism development	55	2.9455	1.4197
DM14	Awareness of the tourism industry on the importance of long-term sustainable tourism development	55	3.0545	1.3391
DM15	Recognising of the existing tourism products	55	3.3091	1.1365
DM16	Development and promotion of a brand and new tourist products	55	2.8727	1.2774
DM17	Recognising the importance of a quality tourism brand	55	3.0909	1.2213
DM18	Strategic relationships among tourism companies	55	2.6364	1.3384
DM19	Development of social tourism (for the disabled, elderly ...)	55	2.2000	1.1926
DM20	Efficiency in tourism businesses	55	3.0364	1.1049
DM21	Performances of the tourism businesses	55	3.1091	0.9559
DM22	Level of meeting the tourists' needs in the tourism businesses	55	3.2364	1.1049
DM23	Positive attitude of the local population related to tourism development	55	3.5273	1.0338
DM24	Quality of tourism services	55	3.2182	1.1815
DM25	Reputation of the National Tourism Organization (NTOS)	55	2.9091	1.1430

NOTE. Mean – arithmetic mean (scale 1 to 5) SD – standard deviation. Data were obtained on the basis of the survey conducted in the summer of 2009

four groups: managers of travel agencies and tour operators, tourism organisations' employees, professors in the field of tourism and hospitality as well as students of master and PhD studies based on the method of random sampling.

The empirical analysis consisted of the following: analysis of the socio-demographic characteristics of respondents, analysis of some parts of the questionnaire as well as validation and proving of hypotheses that were set up. Respondents evaluated the indicators on a scale that measures the degree of agreement and disagreement.

Integrated model of tourism destination competitiveness recognises two groups of resources – created and inherited resources. Inherited resources include historical and cultural resources and natural resources. From this point of view, the first group of indica-

tors, selected natural and cultural-historical resources, was divided into eight indicators. In this group, a question that assessed the level of hygiene and cleanliness in Serbia was also added.

Respondents gave relatively high marks to these indicators. This may indicate that Serbia has adequate comparative advantages that are reflected in the natural, cultural and historical resources. The highest value of 4.3273 was given to the indicator R4 (National parks and natural reserves) with high expressed unity of respondents giving those scores (SD was 0.7948).

According to the responses, Serbia has a rich cultural heritage (R7) with an arithmetic mean of 4.2364. Also Folk traditions (R8) are highly rated with an arithmetic mean of 4.2000, Historic monuments (R5) with a 4.1818 and Natural environment (R2) with 4.1091. The worrying fact is that a very low score

TABLE 6. Results of Paired-Samples t-test

Variable	Mean	SD	95% confidence interval		t	Sig. (2-tailed)
			Lower	Higher		
RESOURCE - DMNGMT	0.7199	0.8287	0.49588	0.94396	6.442	.000

NOTE. Mean – arithmetic mean, SD – standard deviation, N = 55. There was a significant difference in the scores for RESOURCE (Mean = 3.6646, SD = .4043) and DMNGMT (Mean = 2.9947, SD = .8695), $t = -6.442$, $p = 0.000$. T-test results were obtained on the basis of the results of a survey conducted in the summer of 2009.

was given to the indicator that showed the level of hygiene and cleanliness in Serbia (R9) with an arithmetic mean of 1.6909. Architecture (R6), with the AA of 3.2000, was also given a lower grade in relation to other indicators.

The second group of indicators defines the activities and influences of the management on tourism policy and development, which is reflected through the activities of the tourism industry and the government. Activities of the government are reflected through the tourism policy, strategy, marketing, especially promotion, educational programs, environmental protection and so on.

The role of the management in achieving a strong competitive position through the usage of the comparative advantages can be judged as insufficient. The Indicator DM23 - Positive attitude of the local population related to tourism development, had the highest arithmetic mean of 3.5273. Only nine more of totally 25 indicators had an average rating more than 3. It is interesting to note that not a single indicator of destination management achieved a result with an arithmetic mean of more than 4,000.

For the purposes of analysis and proving hypotheses, it is necessary to define two variables: The first variable, marked as a "RESOURCE", is calculated as the average score value derived from the answers about the natural, cultural and historical resources in the first group of indicators (Mean = 3.6646, SD = .4043). The second variable, marked as "DMNGMT", is calculated as the average score value derived from the answers that assessed the indicators of destination management (Mean = 2.9947, SD = .8695).

The result of "Paired-Samples t-test" shows the average value of the difference between the variables of RESOURCE and DMNGMT which is 0.7199 with the standard deviation of 0.8287. The boundaries of the confidence interval of 95% of the distribution are at a level of 0.50 and 0.94. The test shows a statistical significance of .000 and therefore it can be concluded that the difference between the tested variables is statistically significant.

Table 6 in which the results of t-test, used for proving the general hypothesis, are displayed shows that, based on the conducted research, in the field of natural, cultural and historical resources Serbia is more competitive than in the field of destination management.

CONCLUSION

One of the key issues of competitiveness of tourist destinations is related to a relative importance of the certain factors of competitiveness and their inter-relations over the time, as well as in a relation to different competitors. The key is belonging of the destination to a particular competitive set and the degree of the difference of specific factors among competitors. Significant difference in the competitive set in relation to a particular factor indicates its determining importance (Crouch, 2011).

Tourism development of Serbia is a big chance for overall economic development of the country, but its current competitive position on the market is not satisfactory and the reasons of Serbia's tourism low competitiveness were analysed and pointed out.

The causes of Serbia's competitive position were analyzed by using the results of the conclusions on the competitive positioning of Serbia as a tourist destination given in the study from 2003, researchers done in Tourism Development Strategy of Serbia (2005) as well as based on the results presented in the TTCI reports for Serbia (2008, 2009, 2011 and 2013.).

According to the TTCI Serbia has a particularly poor competitive position in the following indicators: natural resources, price competitiveness in travel and tourism industry and environmental sustainability. Also, from the TTCI it can be concluded that Serbia lags far behind its competitors and that by all indicators it is behind all the countries that make up the competitive set.

In order to further analyze competitiveness indicators of Serbian tourism two narrow groups of indi-

cators were defined. The first group consisted of indicators of natural, cultural and historical resources, while the destination management was assessed in the second group of indicators. Through the empirical analysis, the competitiveness in the field of natural, cultural and historical resources as well as in the field of destination management was compared.

Based on the conducted research, Serbia is more competitive in the field of natural, cultural and historical resources than in the field of destination management. This conclusion is different from the results

and the values of some important indices in the TTCI. Accordingly, using of the TTCI in order to formulate an appropriate competitive strategy should be very cautious.

Independently from the results of conducted survey, as well as from other weaknesses addressed to this complex index, the importance of using the TTCI cannot be denied, in order to establish the key factors of competitiveness, comparisons with countries that belong to the competitive set as well as to conduct tourism policy.

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Rezime:

Konkurentnost Srbije kao turističke destinacije – analiza odabranih ključnih pokazatelja

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Da bi turistička destinacija stekla povoljniju konkurentsku poziciju mora ponuditi turistima kvalitetnija iskustva koja bi je učinila atraktivnijom u odnosu na druge turističke destinacije. Uloga destinacijskog menadžmenta je da se iskoriste i razviju postojeći resursi na osnovu jasnih i efikasnih strategija razvoja turističkih proizvoda i stvaranja dodatne vrednosti turističkog iskustva. Prvi korak u analizi je definisanje konkurentnosti destinacija pomoću pokazatelja koji će utvrditi konkurentsku poziciju i dati smernice za njeno poboljšanje.

Ovaj rad je posvećen konkurentnosti turističkih destinacija i indikatorima za merenje konkurentnosti sa posebnim osvrtom na Srbiju. Razvoj turizma Srbije je velika šansa za ukupan privredni razvoj zemlje. Trenutna konkurentna pozicija srpskog turizma na međunarodnom tržištu nije zadovoljavajuća i ovaj rad izdvaja i analizira neke od razloga loše konkurentne pozicije turizma Srbije.

Zaključci o konkurentskoj poziciji Srbije kao turističke destinacije su izvedeni na osnovu odgovarajućih istraživanja, kao i Strategije razvoja turizma Srbije. Takođe su analizirani i rezultati Indeksa konkurentnosti turizma Srbije na osnovu metodologije Svetskog ekonomskog foruma (WEF TICI). Na osnovu sopstvenih istraživanja, u ovom radu su prikazani rezultati koji se odnose na konkurentnost Srbije kao turističke destinacije u odnosu na dve grupe indikatora: prirodne i kulturno-istorijske resurse kao i upravljanje destinacijom. Prema rezultatima istraživanja, prirodni i kulturno-istorijski resursi Srbije su značajniji faktor konkurentnosti u odnosu na destinacijski menadžment.

Ključne reči: turistička destinacija, konkurentnost destinacije, pokazatelji konkurentnosti, modeli konkurentnosti, merenje konkurentnosti, Srbija.

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