The Possibilities for the Identification and Evaluation of Tourism Sector Competitiveness Factors

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Tourism is one of the most important and most rapidly growing economy sectors, which faces the challenges and possibilities of globalization. Historically, tourism markets have been national and regional, that is, isolated from one another. However, in the last decades the boundaries between national businesses tend to disappear. General trend of growing income enables individuals and families to travel longer distances. An increase in the quality of tourist products and services, innovations in the field of transport and communications, ingenious measures of tourism marketing, and other factors also significantly contribute to the development of global tourism. The competitiveness of tourist destinations becomes increasingly important to countries that intend to control a large share of rapidly growing tourism market. That is particularly relevant to the tourism-dependant countries, which heavily rely on the situation in tourism and travel industry. The competitiveness of tourism sector encloses many factors, such as natural environment (geographic location, climate, scenery, etc.), artificial environment (tourism infrastructure, transport, supply of leisure and entertainment services, retail stores, hotel network), and globalization of markets. The identification and evaluation of tourism competitiveness factors is a pretty common research problem of many scientific studies and articles dedicated to tourism economics. As tourism markets grow, and the concept of tourism evolves (holiday tourism, tourism of the physically disabled, ecological tourism, conference tourism, political tourism, etc.), the aforementioned research problems become more significant. The object of this study is the identification and evaluation of tourism competitiveness factors. The aim of this study: to identify and evaluate the factors of tourism competitiveness with the use of a systematic approach and renewed version of Competitiveness Monitor (CM) method, adapted for the analysis of modern needs of tourism market.

The following scientific research methods were applied in the study: the systematical and logical analysis of scientific literature, and synthesis. The study carried out by the authors of this article proposes that the competitiveness of tourism sector significantly adds to the economic development. Some countries are not rich in natural resources or highly developed industry sectors. Such countries tend to concentrate their efforts on the development of tourism industry and services. Various competitiveness factors of tourism sector are analyzed in scientific literature. They are related to market conditions, the level of social development, environmental policy, the base of human resources, the quality of infrastructure, technological advancement, and other fields of development. The degree of development strongly correlates with competitiveness of tourist destinations. Competitive tourist destinations offer a wider range of tourist products; attract potential visitors with the help of their exceptional image (for instance, natural scenery, clean lakes, advanced environmental policy are a perfect niche for ecological tourism and environment-friendly country image); and provide services of a particularly high quality.

Keywords: *competitiveness factors, tourism sector competitiveness, evaluation of tourism sector competitiveness, competitiveness monitor.*

Introduction

Tourism is to be considered a greatly important part of urban development, as it combines a competitive supply of tourism services, which corresponds to the expectations of tourists, and a positive impact on the development of regions and cities, as well as general prosperity of their citizens (European Commission Tourism Unit, 2008). The competitiveness of tourist destinations becomes increasingly important to the countries that intend to control a large share of rapidly growing tourism market. That is particularly important to the tourism-dependant countries, which heavily rely on the situation in tourism and travel industry. It can be emphasized that the relevance of tourism sector increases in the economy of other countries as well, even if they rely on the development of other industries rather than tourism sector (Gooroochurn, Sugiyarto, 2004). Therefore the analysis of tourism sector competitiveness factors is significant in both scientific and practical aspects.

The problem of the study. The identification and evaluation of tourism competitiveness factors is a pretty common research problem of many scientific studies and articles dedicated to tourism economics. The following authors contributed to the analysis of tourism sector and tourist destination competitiveness: Inskeep (1991), Poon (1993), Lim (1997), Ritchie and Crouch (1993, 1995, 2003), Kozak and Rimmington (1998, 1999), Dwyer, Forsyth and Rao (1999, 2000), Vanhove (2002), Esponda (2004), Manente (2005), Middleton (1997), Gooroochurn and Sugiyarto (2004) et al. As tourism markets grow, and the concept of tourism evolves (holiday tourism, tourism of the physically disabled, ecological tourism, conference tourism, political tourism, etc.), the aforementioned research problems become even more significant. Even

though different tourism competitiveness factors, their hierarchies and evaluation methods have been analyzed in the researches of the aforementioned scientists, they lack perfection and systematic approach to the quantitative evaluation of tourism competitiveness factors.

The novelty of the study. The authors of the study propose that the evaluation of tourism sector (tourist destination) competitiveness factors is a complex process of systematical indicator analysis. Various factors have been considered in the analysis of tourism sector competitiveness. They include: indirect factors (general environment) and direct factors (tourism environment), as well as different indicators to those factors, which can be measured mathematically. The analysis of competitiveness factors and evaluation of their impact is the first step to the creation of rational and competitive tourism development strategy.

The object of the study: tourism competitiveness factors.

The aim of the study: to identify and evaluate the factors of tourism competitiveness with the use of a systematic approach and renewed version of Competitiveness Monitor method, adapted for the analysis of modern needs of tourism market.

The goals of the study are:
- To identify and systematize the competitiveness factors of tourism sector.
- To analyze alternative methods of tourism sector competitiveness evaluation.
- To create the system of the main tourism sector competitiveness factors (and corresponding indicators), as well as their evaluation scheme, based on the method of Competitiveness Monitor.

The methods of research. The following scientific research methods were applied in the study: the systematical and logical analysis of scientific literature, and synthesis.

The competitiveness factors of tourism sector

The competitiveness of tourism sector encloses many factors, such as natural environment (geographic location, climate, scenery, etc.), artificial environment (tourism infrastructure, transport, supply of leisure and entertainment services, retail stores, hotel network), and globalization of markets.

According to Poon (1993), Vanhove (2002), Dimanche (2005), Ritchie and Crouch (1995, 2003) et al., tourism sector can be described as competitive only when tourist destinations are attractive and high-class products (services) are competitive in terms of quality, as compared with products and services of other tourist destinations, aimed at the same market segments.

Goeldner and Ritchie (2003) propose that the ability to gain, maintain and increase the tourism market share is more significant to the competitiveness of tourist destinations. Other researchers, such as Mangion, Durbarry and Sinclair (2005), add to this approach by proposing that the competitiveness of tourist destinations cannot be separated from the creation of high added-value products and their integration into the tourism market, while at the same time maintaining a relatively larger market share with respect to competitors.

Thus, it can be deduced that the development of tourist destinations must be sustainable not only economically, but also in terms of social policy, politics, ecology, culture, etc. The long-term orientation towards qualitative development of industry also adds to the improvement of country or tourist destination image. These factors are not directly related to tourism, however it is common that economically strong countries have a far better developed infrastructure, tourism base and possess a more attractive tourism image than economically weak countries. General economic development is closely related not only to the inner qualitative changes in a country but also to the level of international competition. The importance and impact of international competition to the development of a country competitiveness (in economic dimension) has been analyzed by various authors (Snieška, 2008; Juščius, Snieška, 2008).

Figure 1 shows the model of Competitiveness and Sustainable Development of Tourist Destinations by Dwyer and Kim (2003). The authors of this article modified this model by detailing the structure of CSD determinants. This model manifests the most important factors of tourism destination competitiveness:

- **Basic/additional resources and factors of tourist destination attractiveness.** These factors embrace natural (basic) and artificial (additional) resources of tourism sector (for instance, parks, camping places, beaches, museums, theatres, scenery, historical sights) and various characteristics of tourist destinations, which add to their attractiveness. Among various artificial resources of tourist destinations, some resources are of particular relevance to the modern economy. For instance, events, commonly described as real-time occurrences or happenings, aimed at target (mass) audiences (Navickas, Malakauskaitė, 2007).

- **The administration of tourist destination**. The administrative factors of tourist destinations are meant to increase the attractiveness of the basic tourism resources and contribute to the formation of additional tourism resources. An efficient administration is the tool for the creation of new standards in quality, efficiency and adaptability, which is one of the main requirements of contemporary tourism sector clientele. The factors of tourist destination policy play a similar role on a larger scale and higher level.

- **Tourism market and quality of life-related CSD determinants.** These determinants embrace various factors, for instance, demand conditions (market type, seasonality, brand awareness, consumer preferences, etc.), regional and (or) national well-being.

Enright and Newton (2005) distinguished two types of factors that detailed certain structural parts of the model for Competitiveness & Sustainable Development (CSD) of Tourist Destinations by Dwyer and Kim (2003). These structural parts are concerned with the tourist destination attractiveness factors and prosperity (or well-being) related factors.
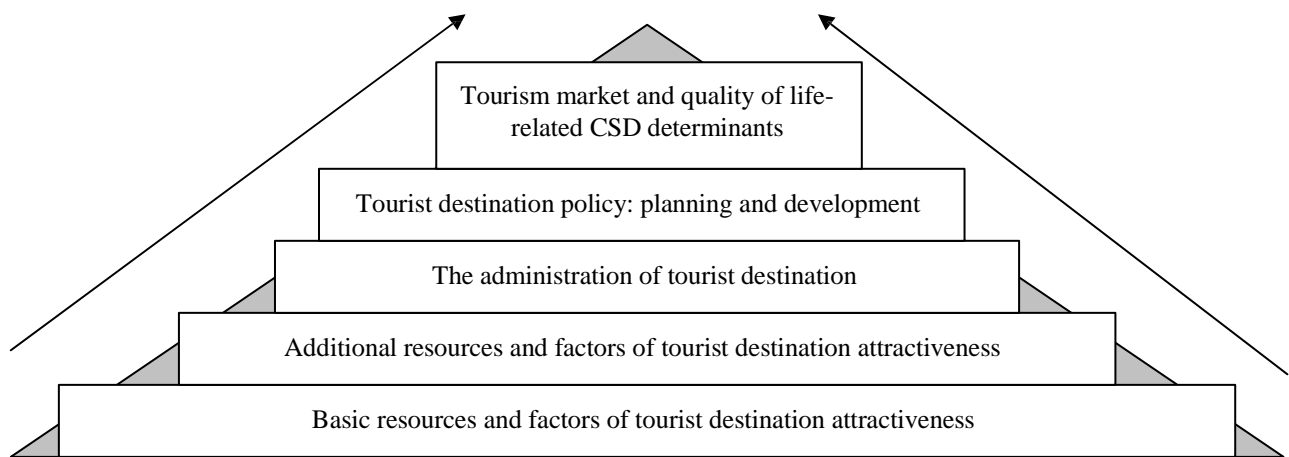
Figure 1. The model of Competitiveness and Sustainable Development (CSD) of Tourist Destinations

Source: the authors, according to Dwyer and Kim (2003), 2008

According to Enright and Newton (2005), the competitiveness of tourist destinations generally depends on specific (tourism market-related) and general (business environment-related) factors (see Table 1).

Snieška and Drakšaitė (2007) propose that general (business environment-related) factors should enclose macro-economical, infrastructural, innovation-related and other indicators. The detailed description of business environment enables us to measure the weight of economic and social impact on the competitiveness of tourist destinations, and hereby contributes to the theory of competitiveness evaluation.

Table 1

The competitiveness factors of tourist destinations

Tourism market-related/ specific factors	Business environment-related/ general factors
- Architecture - History - Local people - Cultural peculiarities - Events (festivals, concerts, etc.) - Museums and galleries - Concert halls and theatres - City nightlife	- Labour cost and skills - The level of retail sector development - The level of technological advancement - Strategies of local companies - Political stability - Anti-corruption policy - The level of educational system - Strong currency and steady prices

Source: Enright and Newton, 2005

Thus, it can be concluded, that the competitiveness of tourism sector and tourist destinations depends on juridical, political, economic, social, cultural, ecological, and technological environment. In spite of that, only specific or tourism market-related factors form the core of tourism destination competitiveness.

Methods for the evaluation of tourism sector competitiveness

The evaluation of tourism sector competitiveness is a pretty common research problem, analyzed in many scientific studies dedicated to tourism economics. It has been investigated by various authors, including Kozak and Remmington (1999), Dwyer and Kim (2003), Enright and Newton (2005), Ritchie and Crouch (1995), Dimanche (2005) et al. An efficient exploitation of competitive potential is to be considered the crucial factor on the list of tourism destination competitiveness factors. The evaluation of competitiveness is a complex process, which embraces various elements, some of which are difficult or impossible to measure. Even the first stage of evaluation

process – the identification of competitiveness factors – might be quite problematic since there happen to be various conceptual variances regarding the definition of competitiveness (Dimanche, 2005).

The methodology and problems regarding the evaluation of tourism sector competitiveness are investigated in various scientific studies. Kozak and Rimmington (1998, 1999) believe that evaluation must be carried out by collecting, systematizing and analyzing the data of opinion polls and tourist surveys. These surveys must examine the experience of tourists under various conditions and in different tourist destinations. This approach is particularly suitable for collecting important data on specific aspects of tourism destination competitiveness, such as the quality of beaches, friendliness of local citizens, the infrastructure of retail sector, etc. Nonetheless, there are various limitations concerned with the usage of opinion polls and tourist surveys. One of them is a pretty limited sample, that is, the number of tourist destinations and respondents that can be physically included in a research. Therefore, no fundamental conclusion can be drawn from that type of survey. Dwyer,

Forsyth and Rao (1999, 2000) use statistical data and previously published survey information, in order to estimate the competitiveness of tourist destinations, but nevertheless their study that dates back to the year 2000, embraced only 19 tourist destinations and comparative analysis of their competitiveness.

According to Gooroochurn and Sugiyarto (2004), the method of Competitiveness Monitor (CM) can be applied for the evaluation of tourist destination competitiveness. The Competitiveness Monitor was created as a result of cooperation between Nottingham's Christel DeHaan Tourism & Travel Research Institute (TTRI) and World Travel & Tourism Council (WTTC). CM is updated annually. The principle of CM structure is similar to that of other competitiveness indicators. It must be emphasized that, unlike polls or surveys, the method of Competitiveness Monitor is universal; it is possible to include an unlimited number of factors and tourist destinations that need to be evaluated.

The Competitiveness Monitor and the system of competitiveness factors

When defining and creating the structure of CM, it is important to identify the elements of competitiveness evaluation. According to the study carried out by the authors of this article, the multi-layer nature of competitiveness is the reason for difficulties in the evaluation process. These difficulties are generally related to the structure of the Monitor, as well as links between the elements of CM.

Price competitiveness is considered to be a particularly important tourist destination competitiveness factor, which dominates in the model of CM. Lim (1997), Durbarry and Sinclair (2003) at al. propose that price has a direct impact on the demand of tourism services. Some authors (Dwyer et al., 1999, 2000) analyze price competitiveness and compare the price of similar goods and services in different tourist destinations. The studies of that type often embrace two price categories – travel prices and ground prices. Travel prices are related to a round trip cost, while ground prices include expenses for a travel guide, souvenirs, entertainment services, hotels, restaurants, night clubs, etc.

Crouch and Ritchie (1999) believe that the evaluation of tourist destination competitiveness might be based on the theory of comparative advantage or the classical Heckscher-Ohlin (H-O) model. According to this model, comparative advantage is dependant on natural and artificial resources of industry (production factors) and their efficient exploitation (Gooroochurn, Sugiyarto, 2004 et al.). Crouch and Ritchie (1999) intend to replace these factors with tourism-related factors in their original model. These factors include: human resources, physical resources, knowledge resources, and capital resources. The Competitiveness Monitor embraces most of these characteristics as they can be measured with the use of mathematical methods. For instance, the base of human and knowledge resources can be expressed by socio-demographic data (population, education level, investment in high-tech sector, etc.).

According to Inskeep (1991) and Middleton (1997), the quality of environment is a crucial factor which determines the attractiveness of tourist destinations. This approach is similar to that of Ritchie and Crouch (1993, 1995), Mihalic (2000), Gooroochurn and Sugiyarto (2004). The theories, published by the aforementioned authors, propose that environmental factors must be integrated in the tourism sector competitiveness evaluation model. There are three ecology (environment) related indicators that are used in the model of CM: the density of population, which determines the level of pollution and quality of life, CO_2 emission and the number of ratified agreements in the field of environmental policy.

Gooroochurn and Sugiyarto (2004) suggest eight main fields of tourist destination competitiveness. All of them are measured in corresponding indicators.

It must be emphasized that the authors of this research have followed the classification of competitiveness factors mentioned above (proposed by Gooroochurn and Sugiyarto (2004) – see Figure 2); yet, they have modified some of the indicators, originally used for the evaluation of tourist destination competitiveness, and they have also included additional indicators that have more potential to reflect the contemporary tourism system and preconditions for its competitiveness in the global economy. For instance, the complex of price competitiveness indicators has been complemented with restaurant prices and prices of tourist goods and services (souvenirs, etc.). The infrastructure development indicators suggested by Gooroochurn and Sugiyarto (2004) embraced only road index and some other indicators, unrelated to transportation system. The authors of this study propose to improve the Competitiveness Monitor of tourist destination competitiveness by adding more transport-related indicators: railroad network, the number of airlines and the quality of telecommunication system. The evaluation of human dimension in tourism sector (see HRI – human resource indicators) was complemented with population indicator. The authors have also replaced one of the social development indicators – the number of personal computers – with the number of available internet cafes, since the latter indicator is more suitable for the measurement of social development level, according to the contemporary perception of social development and (or) advancement.

Price competitiveness indicators

Theoretically, price competitiveness must be measured by evaluating prices of the most commonly consumed products and services (entertainment services, car rental, trips, hotels and restaurants, travel guide, etc). However, in practise the choice of measurable prices depends on the number of tourist destinations to be evaluated in a research. If the number of tourist destinations is large, prices of fewer items are chosen for the evaluation, as a very detailed research is particularly costly. Moreover, some statistical data is hard to obtain, thus, a research might become less accurate and valuable. The index of purchasing power parity is relevant when comparing the prices in economically advanced and less developed countries. The differences in the level of economic development contribute to price competitiveness, since less developed countries pay an exceptional attention to the quality of tourist products and services, but also tend to make them more expensive (set higher prices) than goods, designed for local needs (Gooroochurn, Sugiyarto, 2004).

International tourists buy both types of goods and hereby distort the actual view of price competitiveness in a certain tourist destination.

Infrastructure development indicators

The competitiveness of tourist destinations is related to the development of infrastructure. The development of infrastructure requires a suitable algorithm of government regulation (Čibinskienė, Navickas, 2005). The level of development can be measured with help of the following indicators: road index, availability of hygiene infrastructure, the quality of water intended for household consumption. Road index estimates the relation between the length of roads and population of a tourist destination/ GDP per capita/ the level of urbanization/ other regional indices (World Bank, 2008). Infrastructure development indicators can be supplemented by additional indices and factors, such as: railroad network, the number of airlines,

the quality of telecommunication system, etc. (Manente, 2005).

Ecology (environment) related indicators

Environmental problems can be described as issues of a particular concern. Global awareness and consciousness in the field of environmental protection tends to grow, and, therefore, affects the need to include environmental indices in the method of Competitiveness Monitor. Population index estimates the number of citizens per square kilometer; CO_2 emission is usually evaluated with the help of derivative indices (gas exhaust, industrial pollution, etc.). One of the most important indices to be used for the evaluation of ecology-related competitiveness of a tourist destination is the number of ratified agreements in the field of environmental policy, as it manifests the priorities of sustainable development, as well as the level of environmental concern.
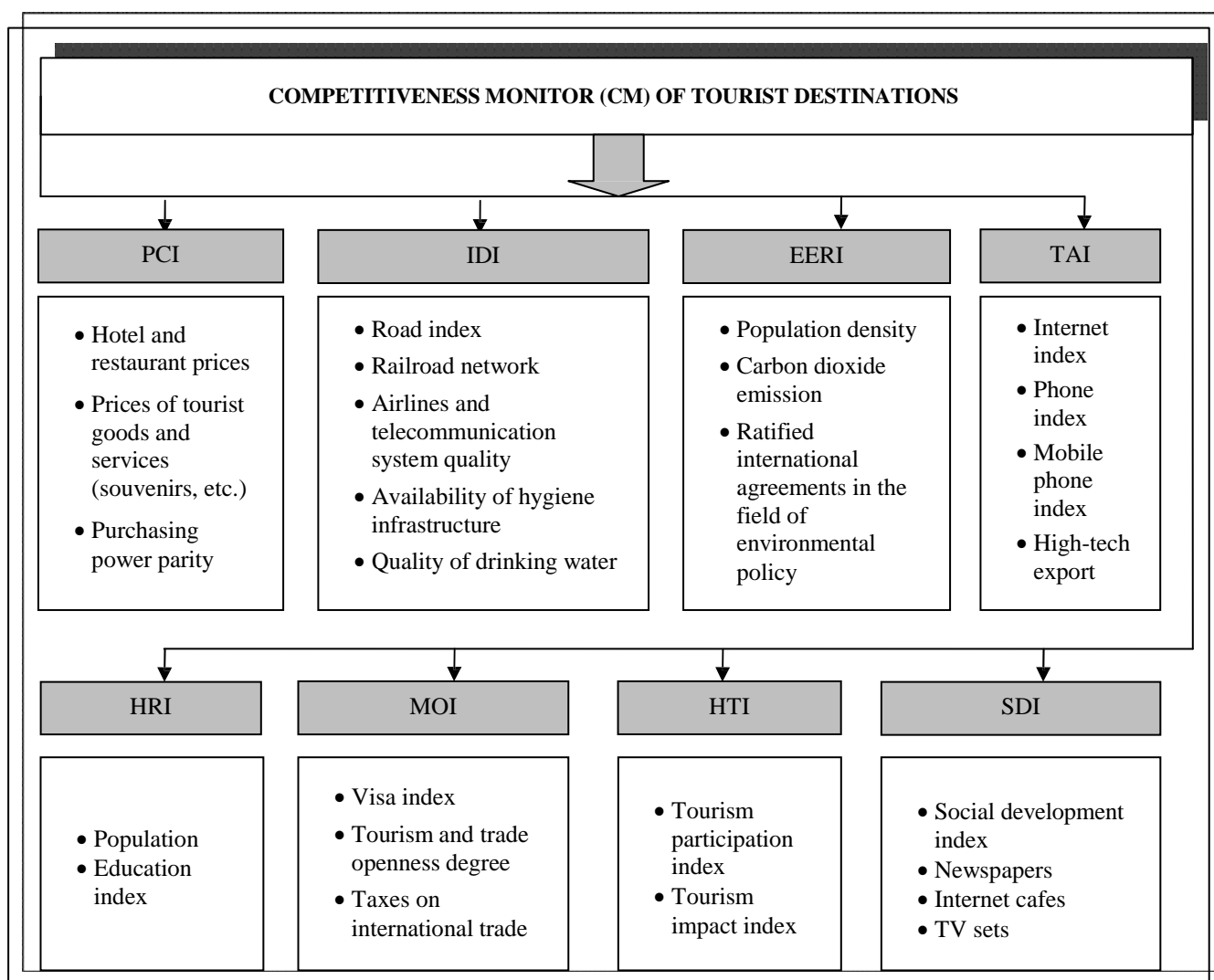

Figure 2. The structure of the Competitiveness Monitor (CM)
Source: the authors, 2008

- HTI – human tourism indicators
- PCI – price competitiveness indicators
- IDI – infrastructure development indicators
- EERI – ecology (environment) related indicators

- TAI – technological advancement indicators
- HRI – human resource indicators
- MOI – market openness indicators
- SDI – social development indicators

Technological advancement indicators

Technological advancement indicators, including high-tech export; the usage of phone lines, mobile phones, and the internet, indicates the technological advancement level of a tourist destination. Internet index estimates the number of computers per 100 (1000, 10.000, etc.) citizens that have an active access to the World Wide Web. Phone index estimates the number of phone lines per chosen number of citizens, while mobile phone index shows the number of mobile service users. High-tech export indicator shows the use of high-tech equipment for the production of export goods. High-tech branches in this context include: aeronautics, IT, pharmacy, electronics, etc.

Human resource indicators

Human resource indicators are intended to measure the quality of labour force in a certain tourist destination. Formal education indices are most widely used in this case, as it is presumable that human resources with a higher level of education are capable of producing goods and services of a higher quality. Education index measures the level of literacy and similar characteristics. Literate individuals are defined as people above 15 years of age that are capable of understanding, reading and writing simple texts of commonly used language. Indices concerned with education levels estimate the number of individuals that belong to certain education levels as compared with all people that belong to the same age group (UNDP, 2008; Gooroochurn and Sugiyarto, 2004). The importance of human resources as a measure of competitiveness had been analyzed by many researchers (Kochetkov, 2005).

Market openness indicators

The main symptom of market openness is a free trade, that is, no limitations to the circulation of goods and services. Most economists propose that market openness is probably the main source of economic development. Market openness indicators embrace visa index, the level of taxes on international trade, the level of tourism and trade openness. Visa index indicates if tourists from strategically important tourist countries (UK, Italy, France, USA, Germany, Canada, etc.) can travel to a tourist destination without a visa. The level of tourism sector openness is measured by the amount of tourist expenditure as a percentage of GDP, while the level of trade openness is measured as a relation between international trade turnover and GDP. Import taxes indicate if a certain country implements a protectionist policy towards international trade. The importance of international trade, as a competitiveness factors, has been analyzed in various scientific researches (Čiburienė, Zaharieva, 2006).

Human tourism indicators

Human tourism indicators measure the impact of human factor on the development and competitiveness of a tourist destination. Tourism impact index estimates tourism sector turnover as a percentage of GDP, while tourism participation index estimates the relation between the number of tourists and number of local citizens (World Travel & Tourism Council, 2008). According to Esponda (2004), tourism participation index tends to be higher in

economically advanced countries (USA, Spain, etc.) and lower in less developed countries (South African states, etc.).

Social development indicators

Gooroochurn and Sugiyarto (2004) propose that quality of life, which is evaluated with the use of social development index, has a vital impact on the attractiveness of tourist destinations. 'Quality of life' concept embraces several indices, such as: life expectancy, household income, etc. A very significant indicator of social advancement is the availability of the internet cafes, press (newspapers) and TV sets to both – tourists and local citizens.

It can be deduced that the competitiveness of tourism sector significantly adds to the economic development. Some countries are not rich in natural resources or highly developed industry sectors. Such countries tend to concentrate their efforts on the development of tourism industry and services. Various competitiveness factors of tourism sector are analyzed in scientific literature. They are related to market conditions, the level of social development, environmental policy, the base of human resources, the quality of infrastructure, technological advancement, and other fields of development. The degree of development strongly correlates with competitiveness of tourist destinations. Competitive tourist destinations offer a wider range of tourist products; attract potential visitors with the help of their exceptional image (for instance, natural scenery, clean lakes, advanced environmental policy are a perfect niche for ecological tourism and environment-friendly country image); and provide services of a particularly high quality.

Conclusions

The modified version of the Competitiveness Monitor embraces a detailed system of competitiveness factors and indices that can be measured with the use of mathematical methods. The essence of this evaluation system lies in its universal character and amplification possibilities (one can add as many tourist destinations and indices as preferable to obtain a desired degree of accuracy).

It must be emphasized that the authors of this research have followed the basic factor classification in Competitiveness Monitor, yet, they have modified some of the indicators, originally used for the evaluation of tourist destination competitiveness, and they have also included additional indicators that have more potential to reflect the contemporary tourism system and preconditions for its competitiveness in the global economy.

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Turizmo sektoriaus konkurencingumo veiksnių identifikavimo ir vertinimo galimybės

Santrauka

Turizmas – vienas iš svarbiausių ir sparčiausiai augančių ekonomikos sektorių, kuris susiduria su globalios konkurencinės rinkos iššūkiais ir galimybėmis. Istoriškai turizmo rinkos buvo nacionalinės ir regioninės – sąlygiškai izoliuotos nuo kitų šalių turizmo rinkų, tačiau pastaraisiais dešimtmečiais griežtos tarpvalstybinės verslo ribos nyksta. Bendra gyventojų pajamų augimo tendencija įgalina vis daugiau individų ir šeimų keliauti tolimus atstumus. Didėjanti turizmo produktų (paslaugų) kokybė, transporto bei komunikacijų inovacijos, aktyvi rinkodaros veikla taip pat gerokai prisidėda prie globalaus turizmo plėtros. Turizmas laikytinas reikšminga urbanistinio vystymosi dalimi, nes jis sujungia konkurencingą pasiūlą, tenkinančią turizmo sektoriaus vartotojų lūkesčius, bei teigiamą poveikį miestų (regionų) plėtrai bei jų gyventojų gerovei. Turizmo vietovės plėtra turi būti tolygi ne vien ekonomine, bet ir ekologine, socialine, kultūrine, technologine ir politine prasme. Ypač didelę reikšmę turizmo sektoriaus vystymuisi turi orientacija į ilgojo laikotarpio ekonominius rezultatus, kokybinę pramonės plėtrą, kuri gerina šalies (kartu ir jos turizmo sektoriaus) įvaizdį. Turizmo vystymasis ir turizmo vietovės konkurencingumas tampa vis reikšmingesnis šalims, siekiančioms kontroliuoti kuo didesnę sparčiai augančios turizmo rinkos dalį. Tai labai aktualu nuo turizmo veiklos priklausomoms šalims, kurių ekonominė padėtis svyruoja, priklausomai nuo situacijos kelionių ir turizmo rinkoje. Turizmo sektoriaus konkurencingumas – daug skirtingų veiksnių apimantis reiškinys: konkurencingumui įtaką daro tiek natūrali aplinka (pvz., geografinė padėtis, klimato sąlygos, kraštovaizdis), tiek sukurta aplinka (pvz., turizmo infrastruktūra, transportas, pramogų ir laisvalaikio paslaugų pasiūla, mažmeninės prekybos, apgyvendinimo ir maitinimo įstaigų tinklas), tiek rinkų globalizacija. Turizmo sektoriaus konkurencinio potencialo veiksnių identifikavimo ir vertinimo problemos – daugelio turizmo ekonomikos srities mokslinių tyrimų bei studijų objektas. Augant turizmo rinkų dydžiui, plečiantis turizmo sampratai (pvz., atostogų turizmas, konferencijų turizmas, ekologinis turizmas, politinis turizmas ir kt.), minėtos problemos tampa vis aktualesnės. Šio tyrimo objektas – turizmo sektoriaus konkurencingumo veiksniai ir jų vertinimas. Tyrimo tikslas – išanalizuoti turizmo sektoriaus konkurencingumo veiksnius bei jų vertinimo galimybes, taikant sisteminį požiūrį ir atnaujintą, šiuolaikinės turizmo rinkos poreikiams adaptuotą konkurencingumo monitoriaus metodą. Tyrimo uždaviniai: 1) identifikuoti ir susisteminti turizmo sektoriaus konkurencingumo veiksnius; 2) išanalizuoti alternatyvias turizmo sektoriaus konkuren-cingumo vertinimo metodikas; 3) konkurencingumo monitoriaus metodikos pagrindu sudaryti svarbiausių turizmo sektoriaus konkurencingumo veiksnių vertinimo sistemą, išreikštą atitinkamais indikatoriais. Tyrime buvo taikomi šie moksliniai metodai: mokslinės literatūros sisteminė bei loginė analizė ir sintezė. Konkurencingumo veiksnius galima skirstyti į bendruosius, arba verslo aplinkos, bei specifinius, arba turizmo rinkos. Bendrieji veiksniai sukuria palankią ar nepalankią aplinką turizmo sektoriaus konkurencingumui vystyti, o specifiniai veiksniai formuoja turizmo sektoriaus arba atskiros turizmo vietovės konkurencinio potencialo branduolį. Konkurencingumo veiksniai taip pat gali būti suskirstyti į šias grupes: bazinius turizmo vietovės išteklius ir patrauklumo veiksnius, papildomus turizmo vietovės išteklius

ir patrauklumo veiksnius, turizmo vietovės administravimo ir politikos veiksnius bei konkurencingumo ir tolygios plėtros determinantus. Baziniai ir papildomi turizmo vietovės ištekliai ir patrauklumo veiksniai apima natūralius bei dirbtinai sukurtus turizmo vietovės išteklius (parkus, kempingus, kelius, paplūdimius, muziejus, teatrus, kraštovaizdį, istorijos paminklus ir kt.) bei įvairias turizmo vietovės charakteristikas, sąlygojančias jos patrauklumą. Turizmo vietovės administravimo veiksniai padidina bazinių turizmo vietovės išteklių patrauklumą, prisideda prie papildomų išteklių komplekso formavimo ir kuria naujus kokybės, efektyvumo ir adaptyvumo standartus, kurie reikalingi dinamiškiems, augantiems turistų poreikiams. Analogišką funkciją, tačiau aukštesniu lygmeniu, atlieka ir turizmo vietovės politikos veiksniai. KTP determinantams galima priskirti paklausos sąlygas (rinkos tipą, sezoniškumą, prekių ženklų žinomumą, vartotojų teikiamas pirmenybes ir kt.), regioninės ir (ar) nacionalinės gerovės sąlygas ir konkurencingumo veiksnius, kurie yra suvokiami kaip subjektyvūs bei objektyvūs turizmo vietovės konkurenciniai ištekliai. Turizmo sektoriaus konkurencingumo vertinimas – viena iš aktualiausių turizmo ekonomikos problemų. Efektyviai išnaudojamas konkurencinis potencialas laikytinas lemiamu turizmo vietovės sėkmės veiksniu. Konkurencingumo vertinimas – itin sudėtingas procesas, nes jis įtraukia įvairius elementus, kurių reikšmes ne visada įmanoma įvertinti. Net pirminis proceso etapas – konkurencingumo elementų identifikavimas – gali būti problematiškas, kadangi egzistuoja nemažai koncepcinių neatitikimų pačioje konkurencingumo sampratoje. Konkurencingumo veiksnių vertinimas gali būti atliekamas renkant, sisteminant bei analizuojant turistų apklausų, skirtų išsiaiškinti jų patirtį skirtingose turizmo vietovėse, duomenis. Pagrindinis šio kokybinio metodo privalumas tas, kad apklausų būdu galima surinkti svarbią informaciją apie specifinius turizmo vietovės konkurencingumo veiksnius, pvz., paplūdimių kokybę, vietinių gyventojų draugiškumą, prekyviečių infrastruktūrą ir pan. Tačiau egzistuoja įvairūs apklausų taikymo apribojimai, pvz., nedidelė imtis (dažniausiai apsiribojama kelių turizmo vietovių, tiesiogiai konkuruojančių viena su kita, tyrimu), kuri neleidžia daryti fundamentalių išvadų. Kitas tyrimo autorių analizuojamas turizmo sektoriaus konkurencingumo vertinimo metodas – konkurencingumo monitorius. Šis kiekybinis metodas, priešingai nei turistų apklausos, pasižymi universalumu ir galimybe į vertinimą įtraukti neribotą kiekį veiksnių ir turizmo vietovių. Sudarant konkurencingumo monitorių, ypač didelę reikšmę turi konkurencingumo vertinimo elementų identifikavimas.

Remiantis šio tyrimo autorių atlikta analize, daugiapakopė konkurencingumo prigimtis sąlygoja turizmo vietovių konkurencingumo vertinimo sunkumus, susijusius su konkurencingumo monitoriaus struktūros ir ryšių tarp vertinamų elementų nustatymu. Dėl šios priežasties tyrimo autoriai turizmo vietovės (turizmo sektoriaus) konkurencingumo veiksnių vertinimą pateikia kaip sisteminį pasirinktų indikatorių analizės procesą. Formuojant konkurencingumo veiksnių vertinimo sistemą buvo įtraukti tiesiogiai ir netiesiogiai su turizmu susiję veiksniai ir juos įvertinti turintys galimybę rodikliai: kainų konkurencingumo indikatoriai (viešbučių ir restoranų kainos, suvenyrų ir kitų prekių kainos perkamosios galios paritetas), infrastruktūros plėtros indikatoriai (kelių indeksas, sanitarinė infrastruktūra, geriamo vandens kokybė), aplinkos (aplinkosaugos) indikatoriai (populiacijos tankumas, anglies dioksido emisija, ratifikuotos aplinkosaugos sutartys), technologinės pažangos indikatoriai (interneto indeksas, telefono indeksas, mobilių telefonų indeksas, aukštųjų technologijų eksportas), žmogiškųjų išteklių indikatoriai (gyventojų skaičius, išsilavinimo indeksas), rinkų atvirumo indikatoriai (vizos indeksas, turizmo ir prekybos atvirumas, užsienio prekybos mokesčiai), žmogiškieji turizmo indikatoriai (dalyvavimo turizmo sektoriuje indeksas, turizmo poveikio indeksas) ir socialinio išsivystymo indikatoriai (socialinio išsivystymo indeksas; laikraščių, personalinių kompiuterių su interneto prieiga bei televizorių prieinamumas vietos gyventojams ir turistams). Turizmo sektoriaus konkurencingumo veiksnių analizė, jų poveikio vertinimas yra pirmas žingsnis į efektyvios turizmo plėtros strategijos kūrimą. Atliktas tyrimas leidžia daryti išvadą, kad turizmo sektoriaus konkurencingumas gerokai prisideda prie ekonomikos plėtotės. Dėmesys turizmo sektoriaus konkurencinio potencialo didinimui itin būdingas šalims, kurios nepasižymi gausiais natūraliais ištekliais ar išvystyta pramone. Literatūroje išskiriami įvairūs turizmo vietovių konkurencingumo veiksniai, susiję su rinkos sąlygomis, socialinės pažangos lygiu, žmogiškųjų išteklių baze, ekologine politika, technologinio išsivystymo lygiu, infrastruktūros kokybe ir kitomis plėtros sferomis. Kuo geriau išvystytos minėtos turizmo vietovės charakteristikos, tuo konkurencingesnė vietovė, kadangi susidaro sąlygos didinti turizmo produktų pasiūlą, sudominti potencialius lankytojus išskirtiniu įvaizdžiu (pvz., švarūs vandens telkiniai, dėmesys aplinkosaugai – terpė ekologiniam turizmui) ir teikti aukštesnės kokybės turizmo paslaugas.