

COMPARATIVE ANALYSIS OF TOURISM DESTINATION COMPETITIVENESS: CROATIA VS. SERBIA

Abstract

VANJA PAVLUKOVIĆ, PhD, Full professor
University of Novi Sad Faculty of Sciences,
Department of geography, tourism and hotel
management
Trg Dositeja Obradovića no 3, 21000 Novi Sad,
Serbia
Phone: +381214852829
E-mail: vanja.dragicevic@dgt.uns.ac.rs

IVA SLIVAR, PhD, Associate Professor
Juraj Dobrila University, Faculty of Economics
and Tourism "Dr. Mijo Mirković",
Department of tourism
Preradovićeve 1/1, 52100 Pula, Croatia
Phone: +38552377018
E-mail: iva.slivar@unipu.hr

SANJA KOVAČIĆ, PhD, Associate Professor
University of Novi Sad Faculty of Sciences,
Department of geography, tourism and hotel
management
Trg Dositeja Obradovića no 3, 21000 Novi Sad,
Serbia
Phone: +381214852837
E-mail: sanja.bozic@dgt.uns.ac.rs

The purpose of this paper is to evaluate the tourism destination competitiveness of Croatia and Serbia from the perspective of tourism industry stakeholders, and subsequently compare their perceptions. Using the convenience sampling method and the snowball approach, tourism stakeholders in both countries were asked to assess 47 competitiveness indicators across four dimensions on a 5-point Likert scale. Comparative analysis of survey results revealed commonalities and disparities in stakeholders' viewpoints. The findings indicate that both Croatia and Serbia should focus on addressing perceived weaknesses and leveraging strengths to enhance their competitiveness. Notably, both countries receive positive evaluations for their natural and cultural resources, suggesting their potential for tourism development. Stakeholders in Croatia perceive their country as more competitive than Serbia, particularly in marketing, experience, and infrastructure. However, Serbia faces challenges in these areas, indicating the need for improvement, especially in quality of tourism offerings and infrastructure. Also, Serbia struggles with international awareness, destination positioning, and brand perception. Croatia should continue investing in sustaining and enhancing its competitive advantages, while Serbia should focus on improving infrastructure, refining tourism policies, and enhancing marketing initiatives. Both countries should prioritize stakeholder consultations to gather insights and foster collaborative decision-making, along with establishing systems for continuous monitoring of competitiveness indicators and adapting strategies to changing market dynamics. The study highlights implications for DMOs and tourism businesses in each country, emphasizing the importance of cross-country comparisons to understand the significance of competitiveness attributes and the efficacy of strategies within the tourism industry context. This research offers both theoretical and practical contributions, providing policymakers and stakeholders with insights to tailor strategies aligned with stakeholder perceptions and to boost competitiveness in the tourism industries of Croatia and Serbia.

Keywords tourism destination competitiveness, tourism industry stakeholders, Croatia, Serbia, comparative analysis

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INTRODUCTION

As the global tourism landscape undergoes profound transformations, marked by increased competition between destinations, the need for a nuanced understanding of destination competitiveness becomes paramount (Dwyer et al 2016a). The tourism industry is witnessing significant shifts influenced by economic, social, demographic, political, technological, and environmental changes. Tourism managers face the challenge of navigating these changes to ensure the industry's resilience and success. While the core resources of destinations, such as natural, cultural, and created assets, form the foundation of a sustainable tourism industry, continuous and responsible destination management emerges as a crucial factor in gaining a competitive edge within the framework of sustainable development (Crouch and Ritchie 1999; Dwyer and Kim 2003).

The competitiveness of a destination is tied to its ability to deliver superior goods and services that outperform those of other destinations in satisfying visitor needs (Dwyer and Kim 2003). Numerous studies have investigated tourism competitiveness, seeking to comprehend the multifaceted factors that impact a country's ability to attract and retain tourists (Armenski et al. 2018; Goffi et al. 2019; Bu et al. 2021). The assessment of a country's tourism competitiveness entails an examination of various factors, including natural and cultural resources, infrastructure, tourism policy, marketing and overall appeal to tourists. Furthermore, a country is competitive or uncompetitive against relevant competing destinations (Enright and Newton 2005). Therefore, it is important to conduct a comparative analysis among competitors to identify strengths and weaknesses of each destination. A comparative analysis aids in understanding how each destination is positioned in the international tourism market (Dwyer et al 2016b). Governments, tourism boards, and businesses can utilize the information to refine policies, enhance infrastructure and services, and tailor marketing strategies based on identified strengths and weaknesses. A comparative analysis serves as a valuable tool for informed decision-making, sustainable development and strategic positioning within the global tourism landscape (Dwyer et al 2016b).

However, the comparative studies on tourism destination competitiveness (TDC) are quite scarce. In this context, two south eastern European countries, Croatia, well-established destination, and Serbia, emerging destination and developing economy, provide an interesting focus for study TDC. Both nations, former members of socialist Yugoslavia, have underscored the significance of tourism in their development while transitioning from a socialist to a market-based economy. Therefore, the aim of this study is to evaluate TDC of Serbia and Croatia from industry stakeholders' perspective, compare the results and identify strengths and weaknesses of tourism development in both countries. Lastly, our objective is to analyse the implications of the results for the strategic management of the tourism industry in each country.

1. LITERATURE REVIEW

Competitiveness, a multifaceted concept in business, management, and international trade, has garnered extensive attention and interest (Ritchie and Crouch 2003). Various academic disciplines have sought to conceptualize and analyse competitiveness, each offering unique perspectives on the subject.

Ritchie and Crouch (2003) view a destination's competitiveness as the ability to create added value and increase national wealth by managing assets, processes, attractiveness, and proximity within an economic and social model that considers a destination's natural capital and its preservation for future generations. Competitiveness has been identified as a crucial factor for the success of tourist destinations in the tourism literature (Crouch and Ritchie 1999; Dwyer and Kim 2003; Enright and Newton 2004; Mazanec et al. 2007; Armenski et al. 2018). Competitive tourist destinations are believed to expand their tourism industry and enhance the quality of life for the local population.

Despite numerous contributions to the understanding and practical research of TDC, there is no universally accepted definition of competitiveness or a standardized means of measuring it (Gomezelj and Mihalič, 2008). The existing knowledge and research in TDC cover various dimensions, methodologies, and conceptual frameworks. Scholars like Ritchie and Crouch (2003) and Dwyer and Kim (2003) have laid the groundwork by proposing conceptual models that define and measure TDC. These models incorporate a combination of supply and demand-side factors and emphasize the crucial role of a well-designed destination management program in enhancing TDC. Studies often consider the impact of global trends, such as economic changes, technological advancements, demographic shifts, and environmental concerns, on TDC. Adapting to these trends is crucial for long-term success.

Many studies rely on established TDC models like Dwyer and Kim's (2003) Integrated model or Ritchie and Crouch's (2003) model for TDC evaluation (Dwyer et al. 2016a; Drakulić Kovačević et al. 2018; Goffi et al. 2019; Bu et al. 2021). Researchers have identified a wide range of determinants influencing TDC. These include natural and cultural resources, infrastructure, tourism policy, sustainable development practices, marketing and overall visitor experience. Understanding the policy implications of competitiveness research is essential. It involves recognizing the role of government policies, public-private partnerships (Armenski et al., 2018) and regulatory frameworks in shaping a destination's attractiveness and competitiveness. Stakeholder engagement, including the perspectives of residents, industry stakeholders, and government bodies, is often considered a critical aspect (Cimbaljević et al. 2023). The support of local communities and collaboration between various stakeholders can significantly impact a destination's competitiveness (Lopez et al., 2018). Some studies specifically focus on emerging destinations or those undergoing economic and political transitions, shedding light on the challenges and opportunities unique to these contexts (Dwyer et al. 2016a; Armenski et al. 2018; Drakulić Kovačević et al. 2018). Comparative studies between different destinations, like this one focusing on Croatia and Serbia, offer insights into the unique challenges and opportunities each location faces. These analyses help stakeholders make informed decisions.

Despite significant progress, there is a continuous call for more empirical studies, adjustments to existing TDC models and a focus on destination-specific indicators (Moradi et al. 2022). This reflects the dynamic nature of the tourism industry and the importance of tailored approaches, stakeholder collaboration and adaptability to changing global dynamics. In this context, Serbia as relatively under-researched compared to many other destinations globally, provides an interesting area to evaluate TDC amongst global environmental changes and the unique challenges of transitioning from a socialist to a market-based economy. This comparative analysis, particularly against a well-established destination like Croatia, not only contributes to the understanding of the dynamics within these individual countries but also sheds light on broader implications for destination management strategies in the evolving global tourism landscape.

3. METHODOLOGY

For the purpose of this study, existing TDC models with a comprehensive range of indicators are adapted and customized by Serbian tourism experts and industry representatives. The final TDC model consisted of 47 indicators across four factors: Natural and cultural resources, Quality of tourist offer and infrastructure, Tourism policy and sustainable development of tourism and Marketing and experience. The electronic survey with tourism stakeholders of Serbia was carried out from October 2022 until March 2023. The sample of 207 stakeholders evaluated the competitiveness indicators of Serbia on a 5-point Likert

scale compared to Croatia (1- the level of competitiveness of Serbia is significantly lower than Croatia to 5 - the level of competitiveness of Serbia is significantly higher than Croatia)

After research in Serbia, the questionnaire with the same competitiveness indicators as in the case of Serbia was prepared to assess the competitiveness of Croatia, which has been identified in previous research as one of the main competitors to Serbian tourism. The respondents from Croatia were asked to evaluate the competitiveness indicators of Croatia in comparison to Serbia on a scale from 1 (the level of competitiveness of Croatia is significantly lower than Serbia) to 5 (the level of competitiveness of Croatia is significantly higher than Serbia). The electronic survey with tourism stakeholders in Croatia was conducted in June 2023. The sample of 127 tourism stakeholders included representatives from the public and private sectors, as well as academia. Both questionnaires were based on a convenience sample whereas the survey was distributed using a snowball approach. This means that initial participants in the study were selected based on their easy accessibility or proximity to the researchers. Additionally, the snowball approach was employed for distributing the survey. This method involves leveraging the initial participants obtained through convenience sampling to refer other potential participants who meet the criteria for the study. In this case, tourism stakeholders who were readily available and willing to participate were asked to refer other stakeholders, thereby expanding the sample size through referrals. Combining convenience sampling with the snowball approach allowed the researchers to efficiently gather a diverse pool of participants from the tourism industry in both countries.

4. RESULTS

An Independent sample t-test has been performed in order to compare stakeholders' perceptions of TDC between Serbia and Croatia. The results indicate statistically significant differences in the case of all four analysed factors of TDC.

Table 1: The results of the independent sample t-test between stakeholders' perceptions of TDC in Serbia (group 1) and Croatia (group 2)

Factors of TDC	t	df	Sig. (2-tailed)	Mean Difference
Natural and cultural resources	3.155	309	0.002	0.23619
Quality of tourism offer and infrastructure	-11.914	307	0.000	-1.04922
Tourism policy and sustainable development	-8.665	303	0.000	-0.80652
Marketing and experience	-9.486	307	0.000	-0.85244

Source: Author's calculation

Specifically, the results show that stakeholders from Serbia consider more than those from Croatia that Serbia has better Natural and Cultural Resources compared to Croatia. On the other hand, stakeholders from Croatia have given higher grades to the Quality of tourism offer and infrastructure, Tourism policy and sustainable development and Marketing and experience as a TDC factors of Croatia compared to Serbia.

Table 2 highlights variations in stakeholder perceptions of TDC between Serbia and Croatia across different dimensions. Stakeholders from Croatia believe that Croatia's competitiveness is higher than Serbia's in all competitiveness factors. They perceive Croatia as most competitive in the domain of marketing and experience, and the competitiveness level of Croatia comparing with Serbia is lowest when it comes to tourism policy and sustainable tourism development.

In the context of natural and cultural resources, both countries receive high mean values, indicating positive perceptions. Bazargani and Kiliç (2021) highlight that natural and cultural resources with infrastructure and policy conditions are critical determinants of tourism performance. Serbia generally scores higher in unique natural resources, landscape beauty, and rich material and intangible cultural heritage, while Croatia excels in unique architectural characteristics.

When it comes to Quality of tourism offer and infrastructure, Croatia outperforms Serbia in all indicators with significantly higher mean values. Wide-ranging accommodation options, quality and diverse tourist activities, and accessible locations and attractions contribute to Croatia's strength. The lowest ratings, however, were given to the air traffic infrastructure in Croatia and the accessibility of tourist products and services for persons with disabilities.

The quality of tourism offers and infrastructure is the lowest-rated factor by Serbian tourism stakeholders, particularly the condition of pedestrian and bicycle paths, road infrastructure, hygiene and cleanliness levels, accessibility of products and services for persons with disabilities, and adaptation to local needs. The low ratings across this competitiveness dimension highlight areas of concern and areas that require attention and improvement. Addressing these issues could contribute to a more positive and competitive tourism environment in Serbia. According to Knežević Cvelbar et al. (2016), tourism infrastructure and destination

management, are the major competitiveness drivers in developing countries (such as Serbia), while destination competitiveness in developed countries depends on the tourism-specific factor of destination management as well as on wider economic conditions.

In the context of Tourism policy and sustainable tourism development factor, Croatia has higher mean values in almost all indicators, suggesting a more positive perception of its policies and sustainable practices. Both countries exhibit variability in stakeholder opinions, with Croatia generally having lower standard deviations. Stakeholders from Croatia believe that country is most competitive compared to Serbia in terms of tourism businesses having access to funds from tourism development programs, alignment of tourism policy with the country's vision as a tourist destination, and the existence of adequate education programs in tourism. Stakeholders in Croatia believe their country offers a superior infrastructure for educating and training professionals in the tourism sector compared to Serbia. This perceived advantage in education programs may contribute to Croatia's overall competitiveness in the tourism industry, as a well-educated and skilled workforce can enhance the quality of tourism services, drive innovation, and contribute to the sustainable development of the tourism sector.

Table 2: Descriptive statistics of the competitiveness indicators

Factors and indicators	Serbia		Croatia	
	Mean Value	Std. Deviation	Mean Value	Std. Deviation
Natural and cultural resources (5 indicators)	4.32	0.614	4.07	0.642
Unique natural resources and landscape beauty	4.44	0.773	4.29	0.760
Unique cultural resources	4.40	0.768	4.06	0.752
Unique architectural characteristics (local architecture)	3.83	1.049	4.07	0.782
Rich material cultural heritage	4.47	0.716	4.04	0.814
Rich intangible cultural heritage	4.47	0.722	3.86	0.843
Quality of tourism offer and infrastructure (10 indicators)	3.08	0.798	4.14	0.556
Wide range of accommodation options	3.25	1.030	4.59	0.659
Quality and diverse tourist activities	3.43	1.035	4.46	0.746
Locations and attractions of significance to tourism are accessible to tourists	3.51	1.032	4.35	0.780
Local tourist and traffic signage	3.03	1.129	4.23	0.753
Road traffic infrastructure	2.87	1.226	4.15	0.909
Air traffic infrastructure	3.30	1.169	3.80	0.876
Bicycle and pedestrian paths	2.65	1.068	3.95	0.942
Adequate signage in English and menus in English in restaurants	3.20	1.097	4.13	0.794
High level of hygiene and cleanliness	2.87	1.060	4.04	0.763
Tourist products and services are accessible to persons with disabilities	2.65	1.175	3.82	0.824
Tourism policy and sustainable development (18 indicators)	3.12	0.788	3.94	0.682
Tourism companies have access to funds from tourism development programs	2.77	0.994	4.23	0.828
Adequate tax incentives for the tourism industry	3.10	1.030	3.69	0.913
Subsidies from the public sector for tourism available to all stakeholders	2.83	1.0803	3.84	0.807
Existing tourism policies, planning, and development align with the country's vision as a tourist destination	2.99	1.090	4.10	0.880
The residents support the development of tourism	3.72	1.003	4.04	0.907
The level and extent of achieved public-private partnerships in tourism are satisfactory	2.96	1.016	3.88	0.898

Key stakeholders in the country's tourism are involved in decision-making processes and long-term planning in tourism	2.90	1.110	3.87	0.858
Local communities engage in food production for tourism needs	3.21	1.041	3.66	0.976
The private sector in tourism recognizes the importance of sustainable tourism development	3.15	1.162	3.91	0.877
The public sector recognizes the importance of sustainable tourism development	3.01	1.182	3.88	0.914
Green (eco) certification programs exists	2.92	1.067	3.97	0.872
Tourism companies examine the satisfaction of their visitors/users of services	3.18	1.074	3.94	0.911
Tourism businesses develop and promote innovative tourism products	3.18	1.081	4.02	0.856
Tourism businesses operate in accordance with ethical principles	3.33	1.000	3.95	0.853
Favourable conditions for entrepreneurship development in tourism	3.32	1.165	3.98	0.867
Adequate education programs in tourism are available.	3.13	1.128	4.16	0.750
The investment environment is favourable for tourism development	3.19	1.232	4.01	0.884
Favourable political situation in the country for tourism development	2.77	0.994	4.03	0.890
Marketing and experience (14 indicators)	3.41	0.790	4.24	0.644
Products, content, and activities in tourism create a high-quality tourist experience	3.54	0.953	4.11	0.805
Destination Management Organization (DMO) clearly identifies target markets	3.30	1.037	4.02	0.882
Positioning the country as a tourist destination on the international market is effective	3.06	1.090	4.28	0.863
The effects of marketing activities are regularly monitored by the national DMO	3.31	1.062	4.02	0.862
Social networks are effectively used to support marketing activities for the country as a tourist destination	3.58	1.102	4.09	0.886
There is a clear awareness in the international market about the country as a tourist destination	2.97	1.125	4.26	0.850
The destination is perceived as an attractive tourist destination	3.85	1.052	4.41	0.755
The image and perception of the country on the market are positive.	3.28	1.106	4.43	0.813
Information about country as a tourist destination is easily accessible on the international market	3.37	1.089	4.31	0.812
Tourist information is easily accessible to tourists during their stay in the country	3.44	1.099	4.28	0.763
Booking tourist services and online reservations of products and services are simple and reliable	3.66	1.033	4.17	0.817
The country's brand as a tourist destination is recognizable on the international tourist market	<i>3.11</i>	1.128	4.48	0.777
Experiences and activities in the country meet the needs and expectations of tourists	3.57	0.936	4.20	0.817
Tourists are willing to recommend the country as a destination to visit	3.76	0.900	4.25	0.867

Source: Author's calculation

Note: Bold values represent the highest average values in the category, while italic values are the lowest average values.

Serbian stakeholders provided notably low evaluations for items associated with the overall political situation, accessibility to funding, subsidies, public-private partnerships, stakeholder participation in tourism decision-making, and the implementation of certified sustainability programs. This lack of political stability and financial support can impact the economic viability and growth of the tourism sector. Moreover, inclusive decision-making is vital for aligning tourism initiatives with the needs and expectations of various stakeholders and is crucial for sustainable tourism development (Armenski et al. 2018). The poor evaluation of the implementation of certified sustainability programs indicates that stakeholders perceive challenges in the adoption, enforcement, or effectiveness of sustainability initiatives or certification schemes within the Serbian tourism industry. There may be a lack of awareness among tourism stakeholders about the importance of sustainability and the benefits of adopting environmentally and socially responsible practices. Additionally, the absence of adequate incentives or recognition for sustainable initiatives could disincentivize businesses from investing in sustainability measures. Stakeholders may perceive obstacles such as financial constraints, technical limitations, or bureaucratic hurdles, in meeting the requirements for obtaining sustainability certifications. There may be a need for capacity building initiatives to enhance the knowledge, skills, and capabilities of Serbian tourism stakeholders in implementing and managing certified sustainability programs effectively. The significance of these challenges is underscored by the growing global emphasis on sustainable and responsible tourism practices. Sustainability is often perceived as a cost rather than an investment (Weeden 2002) by businesses, leading to resistance in prioritizing sustainability initiatives. Embracing sustainability not only contributes to environmental conservation and community development but also enhances destination attractiveness, visitor satisfaction, and competitiveness in the global tourism market (Cucculelli and Goffi 2016). Therefore, addressing the challenges associated with the implementation of certified sustainability programs in the Serbian tourism industry is imperative for enhancing competitiveness, and meeting the evolving expectations of tourists and stakeholders in an increasingly sustainability-conscious world. The highest rating is awarded to the indicator concerning the support of residents for tourism development in Serbia. This is particularly noteworthy, considering the significant role residents play in influencing the visitor experience and shaping a destination's overall competitiveness (López et al. 2018). Positive attitudes among residents can contribute to creating a welcoming and friendly environment, thereby enhancing the country's competitiveness in the global tourism market (Tse and Tung 2021).

Similar to other factors, Croatia leads in perceived competitiveness across various indicators in Marketing and experience dimension. Stakeholders in Croatia view their country more favourably in terms of creating a high-quality tourist experience, effective marketing, and positive country image. The lowest ratings were given to the identification of target markets by the DMO and the use of social networks for marketing. Serbian stakeholders particularly rate low awareness of Serbia in the international market, positioning country as a tourist destination, and the brand of Serbia. These findings suggest that Serbia might be facing challenges in effectively communicating its appeal to the global tourism market. Addressing these concerns would likely involve comprehensive marketing strategies, collaboration between public and private sectors, and potentially reevaluating the existing branding efforts. Improving awareness, strategic positioning, and brand image can contribute significantly to boosting Serbia's competitiveness in the global tourism market and attracting a diverse range of tourists.

CONCLUSIONS

This paper presents and discusses the results of a TDC evaluation for Croatia and Serbia. Tourism industry stakeholders in Croatia were asked to assess 47 competitiveness indicators across four dimensions in comparison to Serbia. The same assessment was conducted in Serbia. Then, the findings from a survey conducted in each country were compared to determine the extent to which tourism stakeholders have common or disparate views. The results have action implications for DMO and tourism businesses in each country. Cross-country comparisons can enhance our comprehension of the significance of various competitiveness attributes across diverse destinations and the efficacy of various strategies based on the context of the tourism industry (Dwyer et al. 2016b). The results of this study provide valuable insights for policymakers and stakeholders to tailor strategies that align with stakeholder perceptions and enhance the competitiveness of their respective tourism industries.

The findings suggest that both countries should focus on addressing perceived weaknesses and capitalizing on strengths. Within competitiveness dimensions, both countries receive positive evaluations for natural and cultural resources, emphasizing the potential of these assets for tourism development. Stakeholders in Croatia perceive their country as more competitive than Serbia across various dimensions, with notable strengths in marketing, experience, and infrastructure. Quality of tourism offer and infrastructure emerges as an area where Croatia outperforms Serbia significantly, revealing potential areas for improvement in Serbia. Serbia shows lower ratings, especially in the quality of tourism offer and infrastructure, indicating potential challenges in these aspects. Serbian stakeholders' evaluations suggest room for improvement in political stability, financial support, and stakeholder involvement in decision-making for sustainable tourism development. The support of residents for tourism development in Serbia receives a high rating, emphasizing the positive impact of community attitudes on destination competitiveness. Serbia faces challenges in terms of international awareness, destination positioning, and brand perception, highlighting the need for enhanced marketing efforts.

Croatia, while performing well, should continue to invest in sustaining and enhancing its competitive advantages, particularly in maintaining high-quality tourism experiences. Strategic initiatives in Serbia might involve enhancing infrastructure, refining

tourism policies, and improving marketing efforts. Both countries should engage in regular stakeholder consultations to gather insights and foster collaborative decision-making in the tourism sector. Also, they should establish a system for continuous monitoring of competitiveness indicators and adapt strategies based on changing market dynamics and global expectations. Both countries could benefit from the development of joint strategies to enhance their tourism performance in the global market and offer diverse tourism experiences. This may include joint marketing campaigns, promotional activities, and partnerships with tour operators to attract international visitors to the region. By collaborating on joint tourism initiatives, Croatia and Serbia can offer visitors a more diverse range of experiences that span across different regions, landscapes, and cultural traditions. This diversity can appeal to a broader spectrum of travellers, from those seeking sun and sea vacations to cultural enthusiasts, adventure seekers, and eco-tourists. Joint strategies can facilitate cross-border tourism initiatives that encourage travellers to explore both Croatia and Serbia as part of a single itinerary or travel circuit. Overall, the development of joint strategies between Croatia and Serbia represents a strategic opportunity to enhance their competitiveness, stimulate economic growth, and promote cultural exchange and understanding.

It is important to note that while the two countries share a common history of being part of the same country, differences emerge in their levels of economic and tourism development, as well as in the pace of transition to a developed economy. Cultural differences also play a significant role and may influence the study's result. Further research could explore the impact of national culture on the assessment of TDC.

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