

DESTINATION COMPETITIVENESS: A STRUCTURAL MODEL FOR MEASURING ATTRIBUTES COMPETITIVENESS OF BAGAN, MYANMAR

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ABSTRACT

The main aim of this study is to propose a structural model for analyzing attributes competitiveness of a particular tourism destination. Despite several destination competitive models are developed by tourism researchers, there is no one size fits all approach as well as they are somewhat varied or lack of unity. Besides, due to the diverse destination features, a model that applied in one destination cannot promise appropriate results for another destination. This paper is designed to fill this study gap by arguing a proper conceptualized framework pertaining the most relevant indicators of studied destination is required prior an actual survey is conducted. To achieve this, case study research was applied in Bagan, Myanmar. The methodological approach is based on mix methods. Firstly, qualitative case study method was applied in Bagan to analyze destination's ground situation. Based on that, the structural model for measuring attributes competitiveness of Bagan was developed by adapting with relevant literature. Second, quantitative questionnaire survey was conducted to international tourists. The results were discussed on importance-performance analysis (IPA) grid which provides a clearer understanding of in what attributes Bagan has more competitive or where it has less and need to be improved. According to IPA analysis, the study discovered that Bagan is more competitive in its wonderful scenery, natural landscape, artistic and cultural heritage, and local friendliness but weak in several destination management tasks and overall destination price. This study provides an important theoretical implication of modifying and adapting the existing models in a manner of putting together the relevant attributes from studied places are required in destination competitive studies.

Keywords: destination competitiveness, destination attributes, structural model, IPA grid, Bagan.

INTRODUCTION

As a consequence of today's globalization, the world is apparently become a smaller place through the wider use of information technology, and faster transportation network so far competition is obviously become omnipresent and seems to be omnipotent (as cultural tourism in Richards, 2007). Tourism destinations are no exceptions have to confront an increasingly competitive setting like all consumer products. The success of the destinations is increasingly defined by its competitiveness compared with other destinations (Dwyer et al. 2000) thereby how tourism destinations develop, maintain, protect, or strengthen their competitive in the global marketplace is become a challenge (WEF, 2007). Any destination that does not maintain its competitiveness will be difficult to stand in the global market.

In tourism context, destination competitiveness studies had emerged around 1990s and increased as a growing interest area among tourism researchers (e.g. Pearce, 1997; Crouch & Ritchie, 1999, 2003; Faulkner et al. 1999; Kozak & Rimmington, 1999; Dwyer et al. 2000; Mihalic, 2000; Hassan, 2000; Dwyer & Kim, 2003; Buhalic, 2000; D'Hartserre, 2000; Heath, 2003; Enright & Newton, 2004, 2005, Crouch, 2011; Gomezelj & Mihalic, 2008; Cracolici & Nijkamp, 2009; Caber et al. 2012; Andrades-Caldito et al. 2013). Destination competitiveness models are subsequently extended and tested empirically in many destinations. Meanwhile, some researchers argued that there is no "one size fits all" approach for measuring any destination competitiveness and no single set of indicators that can apply to all destinations at all times (Gomezelj & Mihalic, 2008; Enright & Newton, 2004,2005). Undoubtedly, every destination possesses different geographical features and different historical backgrounds so that one competitive model applied in one destination may not be applicable to another destination nor may not give appropriate results (Kozak, 2002).

In addition, the embedded indicators in those models are somewhat varied or lack of unity due to different based issues. Despite they are quite similar, the consensus about the set of competitiveness indicators that should be considered is come up yet (Benedetti et al. 2011). This would lead to some ambiguity when study results are compared especially those applied in the same place (e.g. Gomezelj and Mihalic, 2008). Reinforcing the above issues, this paper argues that a proper conceptualized framework

pertaining the most relevant indicators about studied destination is required prior an actual survey is conducted. In other words, destination competitiveness study will get a more comprehensive result if it can develop a suitable conceptual framework enclosing the radical and mainstream factors from the studied destination instead of using directly the existing general conceptual models. The objective of the study, therefore, is to introduce a structural model to evaluate the competitive attributes of a particular destination in an attempt to avoid the aforementioned shortcomings and study gap of no “one size fits all” approach and “lack of unity” in destination competitiveness models.

STUDY SITE

This study was conducted in Bagan, Myanmar, an ancient archaeological site containing over 2000 well preserved ancient temples, pagodas and monuments of the 11th – 13th century on 42 square km wide. Recently, Myanmar gets much attention from the international arena and renowned as an emerging tourism destination. International tourist arrivals is outwardly increasing year by year, Bagan is no exception. On the other hand, there are many comparing destination to Bagan within the region. Myanmar is one of the Association of South-East Asia Nations (ASEAN) countries and all ASEAN countries are steering to Asean Economic Community (AEC) in 2015. Tourism is considered one of twelve main sectors in this integration efforts and seemd to be more tourism flourishing in the AEC era. In this juncture, one thing ASEAN countries have to aware is similar feature of their destinations in terms of natural, cultural, traditions, lifestyle and friendly manner. The more destinations are similar the more tourists are perceived as a relatively homogenous destination and the more likely to choose to visit a few places (Mekong Tourism Competitiveness & Opportunities, 2008). ASEAN countries are, therefore, strongly needed to explore, highlight and maintain of each salient destination attributes in order to show off to potential tourists. Due to acknowledge of this reason, the current study is designed to provide suggestions to destination managers by exploring in what attributes, Bagan is more competitive or where it is less and need to be improved on the eyes of international tourists.

LITERATURE REVIEW

Destination competitiveness is the ability of a destination to deliver goods and services that perform better than other destinations (Dwyer and Kim, 2003). Tourism destination, by its nature, composed of the amalgam of tourism products offering an integrated experience to customers (Buhalis, 2000). These are called destination attributes and the combination of the multidimensional attributes of one destination can create the overall attractiveness of that destination. But, one should not expect that tourist visiting one place is like those going to another place. They might have a several reasons for choosing one destination over another. Not all attributes could be important or determinant for tourists (Crouch, 2011) which is clearly need to detect what are the favorable factors for tourists choosing one destination over another, which have more competitive or less, and where improvement is needed to take the advantage of latent opportunities.

Further, once a destination reached its highest development holding its competitive advantage the cycle of destination development can draw downturn. According to Bulter (1980), any destination has to face tourism area life cycle through five stages: exploration, involvement, development, consolidation, and post-stagnation (i.e. stabilization, decline, or rejuvenation). In order to respond to each scenario of tourism area life cycle, every destination needs to take necessary actions for sustaining of its attractiveness and competitiveness. Thus far, the evaluation and analysis of destination attributes is increasingly being recognized as an important tool in order to find out destinations’ attractiveness, uniqueness and competitiveness among several alternatives.

In tourism context, several destination competitiveness models and its set of indicators have been addressed on different settings. The most comprehensive framework was developed by Crouch and Ritchie (1999, 2003). Known as the Calgary Model, it is based on a destination’s resource endowments (comparative advantage) and its deploy resources (competitive advantage) stretching 36 attributes on five different layers; core resources and attractors, supporting factors and resources, qualifying and amplifying determinant, destination management, and destination policy, planning and development. The model also recognizes the impact of macro and micro environmental forces.

Hassan (2000), on the other hand, proposed a competitive model that examines relationships among stakeholders. This model comprises comparative advantage, demand condition, industry structure, and environmental commitment indicators. Demand condition here means the ability of destination to respond to the changing nature of market demand. Heath (2003) also established a competitive model emphasizing key success drivers (people) and the vital linkages (communication and information). Heath’s model consists of four components as a form of a house; the foundations, the cement, the building blocks, and the roof. In the same vein, Dwyer and Kim (2003) also undertook so-called integrated model consists of six key elements; inherited (endowed) resources, created resources, supporting resources, situational conditions, destination management, and demand conditions. Unlike with Hassan (2000), demand condition is concerned with travelers’ motivation comprising tourists’ perception, awareness and destination image.

The most development in this endeavor is Travel and Tourism Competitiveness Index (TTCI), conducted by World Economic (WEF 2007). The TTCI is mainly based on three broad sub-indexes: regulatory framework, business environment and infrastructure, and human, cultural and natural resources. Each of 3 sub-indexes is composed of several pillars, in turn, made up of a number of individual variables.

METHODOLOGY

1. CASE STUDY METHOD

First of all, qualitative case study method was applied as a preliminary analysis to acquire ground information of Bagan. Triangulation data collection approach was applied for validation purposes. Data were gathered from multiple sources: reviewing documents (tourism promotional materials, printed documents, meeting minutes, reports, and administrative data from public and private organizations), surfing internet websites (travel websites, journals, magazines and organizational websites), conducting telephone survey to destination managers, and talking with ex-visitors. Data were analyzed by using content analysis method.

Figure 1: Landscape of bagan (photo coutersy of blackrocket2000)



2. EMERGING ATTRIBUTES COMPETITIVENESS MODEL FOR BAGAN

Based on the findings of case study analysis and the thoroughly review of the destination competitive models highlighted by tourism researchers particular in Crouch & Ritchie (2003); Hassan, (2000); Heath (2002); Dwyer & Kim (2003); and Travel and Tourism Competitiveness Index -TTCI (2007), the attributes competitiveness model for Bagan destination was derived in figure 2. Six main indicators and set of measurements are identified into the framework.

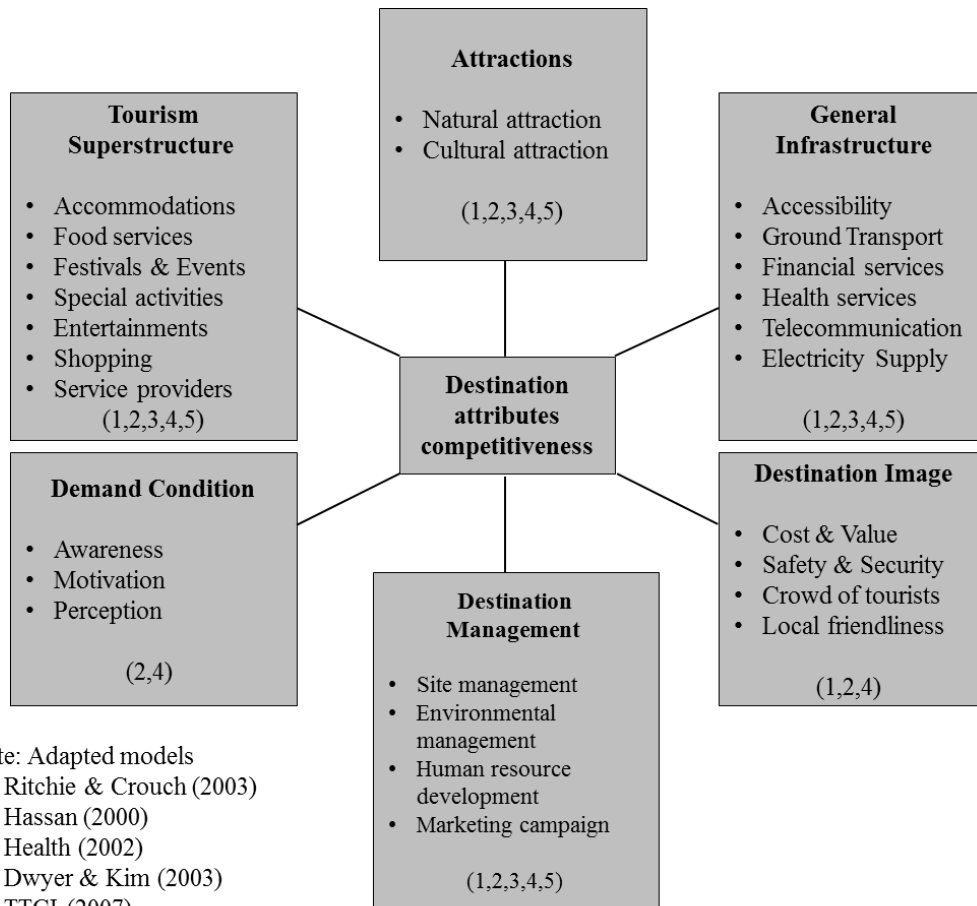
Destination Attraction: Primary appeal of the destination that makes attractiveness to visit (Crouch & Ritchie, 2003). Bagan's natural and cultural attractions are measured. Since Bagan is situated on the eastern bank of the *Ayeyarwaddy River*, the monuments are stretching on the Bagan plain from the river bank up to the other side *Tuyin Mountain Range* so that Bagan could provide breathtaking natural sceneries to travelers. Bagan's sunset is one of the most recommended attractions. In terms of cultural attraction, ancient temples, pagodas and monuments are the main attraction. Magnificent architecture design, artistic mural paintings, local ways of life, traditional arts and crafts such as lacquer-ware, tapestries, paintings, and cotton weaving industry are also cherished by Bagan's tourists, scholars and researchers.

Tourism superstructures: The specific need that can enhance the attractiveness of the tourism destination. Bagan is an experienced tourism destination so far accommodations, food services, festivals and events, special activities, entertainment, shopping, and other tourism related activities are being developed.

General infrastructure: The basic need for every destination including transportation networks, modes of accessibility, ground transportation, financial services, health services, telecommunication services, and electricity supply.

Destination management: An important framework that can match destination resources to proper strategic planning thereby enhance the competitiveness of destination. Site management, strategy formulation, environmental conservation, human resource development and marketing campaign are included.

Figure 2: Attributes competitiveness model for Bagan



Note: Adapted models

1. Ritchie & Crouch (2003)
2. Hassan (2000)
3. Health (2002)
4. Dwyer & Kim (2003)
5. TTCI (2007)

Demand condition: A motivational factor which can stimulate visitation to a destination. Demand condition here is more consistent with the concept of Dwyer & Kim (2003) instead of responding to the changing nature of market demand (Hassan, 2000). According to Dwyer & Kim, a destination may be competitive for one group of visitors but not for another group depending on their motivations. To provide sufficient determinations of destination competitiveness, the examination of why tourists choose a particular destination over another is essential. Destination awareness, motivation and tourists' perception about destination are included as measurements.

Destination image: A special factor for destination competitiveness because the actual visitation largely depends on the tourist attitudes towards destination. Although this indicator is not explicitly measured in the reference competitive models but it is considered as a sub-factor (Crouch & Ritchie, 2003; Hassan, 2000; Dwyer & Kim, 2003). In literature, destination image is referred as an important intangible tourism resource due to its subjective perception (e.g. good/bad, expensive, exotic, exciting, secure). It is also the 'lens' through which tourists perceive all characteristics of a destination and therefore affect all other competitiveness factors (Ritchie & Crouch, 2003). In Bagan case, Myanmar had been placed as an isolated country for decades and global people had known its negative images rather than as a tourist destination. Upon the country's tourism open-up today, people may have several attitudes about Myanmar and its destination. Due to these reasons, "destination image" indicator is necessary to measure Bagan's competitiveness and put into the framework. Cost and value, ensure of safety and security, crowd of tourist and the local hospitality are involved.

3. QUESTIONNAIRE SURVEY

The final step is conducting questionnaire survey to international tourists in Bagan. On the questionnaire, the questions about demand conditions were arranged on nominal scale but the rest are prepared on ordinal five point likert scale (1 = very low, 2 = low, 3 = normal, 4 = high, 5 = very high) in which respondents were asked to rate the importance and competitiveness scale of Bagan's 36 attributes. A total of 500 questionnaires were distributed to hotels, restaurants, and popular places in Bagan during January 2014. Among the hotels, the most Free Independent Travellers (FITs) stayed lodgings were selected based on the assumption that FIT tourists may have much more information about the strength and weaknesses attributes of destination than

those in organized tours which is wholly arranged by tour operators. A total of 257 questionnaires were returned but 58 are invalid as participants provided a few questions with lots of missing value, only 199 are usable for statistical data analysis.

RESULTS

1. DEMOGRAPHIC PROFILE OF THE RESPONDENTS

The majority of Bagan's international tourists are from Europe (55.3%), male and female tourist are likely to be balance (47.2%) and (52.8%). Most of them are educated (38.7%) and middle age between 20-30 (38.7%) and 31-40 (29.6%). In term of travel experience, (85.9%) tourists are first time visitors and they have never been to Bagan. The average length of stay is two to three days.

2. DEMAND CONDITION

This question is asking about why tourists had chosen Bagan destination over others. The most pull factor making tourist decision to choose Bagan is because of its mysterious ancient pagodas (93.5%) so that the motivation to enjoy this beautiful scenery becomes the highest push factor (66.3%). Many of the Bagan tourists are aware of Bagan destination via recommended by their friends and relatives (64.8%). Most of them have the same perception on Bagan as 'A cultural destination' of 'Land of pagodas.'

3. IMPORTANCE-PERFORMANCE ANALYSIS (IPA) GRID

IPA is originally developed by Martilla and James in 1977 which is a simple analysis technique to understand customers' perception (Caber et al. 2011). In the IPA grid, the combine measures of importance and performance (in this case competitiveness) are plotted into two dimensional grid: importance scores on Y axis and competitiveness scores on X axis. The mean scores of 36 attributes are plotted on grid and four quadrant are divided by the average means of importance (3.77) and competitiveness (3.25) (Figure 3).

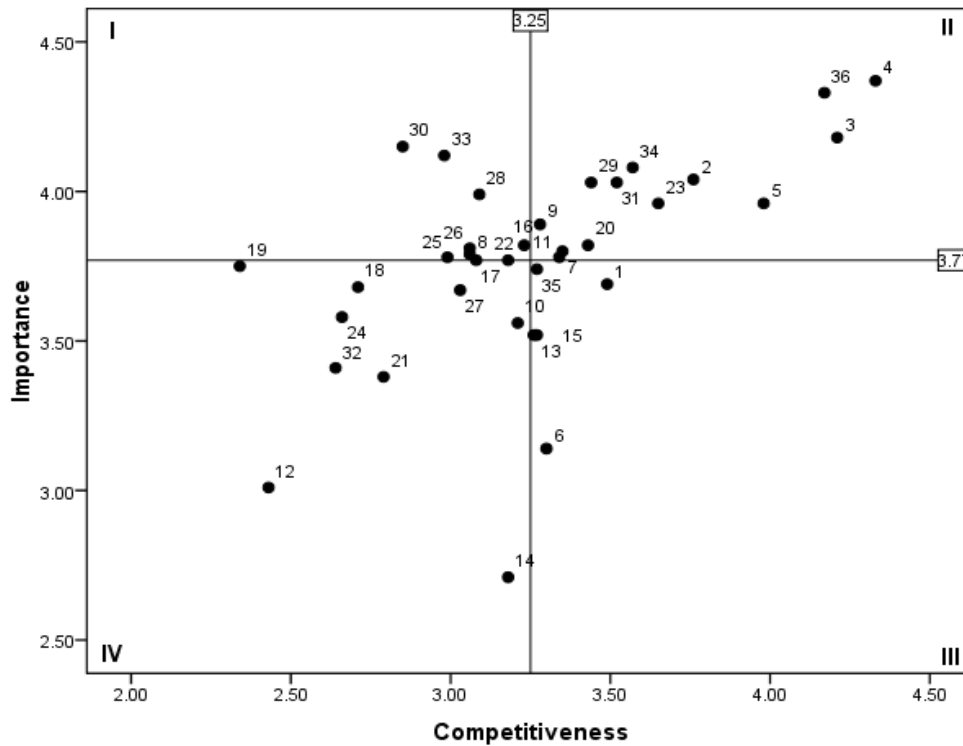
Quadrant I (concentrate here): this part identifies high importance but low competitiveness. According to Martilla and James (1977), this quadrant is the most critical and decision makers are recommended to concentrate here. According to the result needs to put more effores on telecommunication services, cleanliness and environmental conservation, multilingual signage, easy access to get brochures and leaflets, and high price in destination. On the eyes of international tourists, these are importance for Bagan destination but relatively lower perform than other destinations.

Quadrant II (keep up the good job): this part refers to high importance and high competitiveness. Bagan is more competitive on its wonderful scenery, cultural and historical attractions, architectural design, and local friendliness. Destination needs to keep up these good jobs for long term achievement.

Quadrant III (possible overkill): this part includes low impotence but high in competitiveness. Comfortable climate, traditional arts and crafts, tourism activities, service providers, and less crowded of tourists are included. Bagan could perform on these attributes than other destinations, but it is less important for tourists. Any further efforts on those attributes may be wasted effort or possible to overkill.

Quadrant IV (Low Priority): this area identifies neither importance nor competitive. Bagan has relatively weak in evening entertainments, shoppings, public restrooms, and use of information technology in destination, however, these are unimportant according to respondents and referred as low priority attributes.

Figure 3: IPA grid analysis of Bagan destination attributes



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| 1. Comfortable climate | 19. Telecommunication services |
| 2. Natural landscape | 20. Electricity supply |
| 3. Wonderful scenery | 21. Infrastructure to meet visitors' needs |
| 4. Cultural and historical | 22. Cleanliness in destination |
| 5. Artistic and architectural design | 23. Safety and security |
| 6. Traditional arts and crafts | 24. Public bathrooms |
| 7. Exotic and unique local custom | 25. Multilingual signage |
| 8. Variety of accommodation facilities | 26. Easy access to get brochures/leaflets |
| 9. Quality services in accommodation | 27. Favorable policies to tourists |
| 10. Variety of F&B services | 28. Preservation of cultural heritage |
| 11. Quality services in F&B | 29. Conservation of local tradition |
| 12. Variety of evening entertainments | 30. Environmental conservation |
| 13. Tourism activities | 31. Efficiencies of tourism staff |
| 14. Variety of shopping items | 32. Use of IT in destination |
| 15. Presence of service providers | 33. Overall price in destination |
| 16. Various modes of accessible | 34. Ensured safety and security |
| 17. Smooth transportation | 35. Crowd of tourists |
| 18. Banking and financial services | 36. Friendliness of local people |

Table 1: Importance and Competitiveness Mean Scores of Attributes

Attribute Number	Attribute Description	Mean Importance Scores *	Mean Competitive Scores*
Destination Attributes			
1	Comfortable climate for tourism	3.69	3.49
2	Natural landscape	4.04	3.76
3	Wonderful scenery	4.18	4.21
4	Cultural and historical attractions	4.37	4.33
5	Artistic and architectural design	3.96	3.98
6	Traditional arts and crafts	3.14	3.30
7	Exotic and unique local custom	3.80	3.35
Tourism Superstructure			

8	Variety of accommodation	3.79	3.06
9	Quality services in accommodation	3.89	3.28
10	Variety of F&B services	3.56	3.21
11	Quality services in F&B services	3.78	3.34
12	Variety of evening entertainments	3.01	2.43
13	Tourism activities	3.52	3.27
14	Variety of shopping items	2.71	3.18
15	Presence of service providers	3.52	3.26
General Infrastructure			
16	Various modes of accessible	3.82	3.23
17	Smooth transportation within destination	3.77	3.08
18	Banking and financial services	3.68	2.71
19	Telecommunication services	3.75	2.34
20	Electricity supply	3.82	3.43
21	Infrastructure to meet visitors' needs	3.38	2.79
Destination Management			
22	Cleanliness in destination	3.77	3.18
23	Safety and security	3.96	3.65
24	Public bathrooms and restrooms	3.58	2.66
25	Multilingual signage	3.78	2.99
26	Easy access to get destination map/ leaflets	3.81	3.06
27	Favorable policies to tourists	3.67	3.03
28	Preservation cultural heritage	3.99	3.09
29	Conservation of local tradition	4.03	3.44
30	Environmental conservation	4.15	2.85
31	Efficiencies of tourism and hospitality staff	4.03	3.52
32	Use of IT in destination	3.41	2.64
Destination Image			
33	Overall price in destination	4.12	2.98
34	Ensured safety and security	4.08	3.57
35	Crowd of tourists	3.74	3.27
36	Friendliness of local people	4.33	4.17
	Average mean	3.77	3.25

* Scores from a five-point scale "1 = very low, 2 = low, 3 = normal, 4 = high, 5 = very high"

Importance (tourists' expectation) "How importance is the attribute for Bagan tourist?"

Competitiveness (tourists' satisfaction) "How well did this attribute perform verses tourist experiences?"

RECOMMENDATIONS

Bagan is strongly competitive in its natural and cultural attractions such as wonderful scenery, sunrise and sunset, architecture, local ways of life. These are directly related to the environmental and cultural conservations. Unfortunately, Bagan is relatively weak in environmental conservation. The critical issue is waste management; uncollected waste in public places is common even in the historical city. Despite Bagan is now practicing plastic bag free area, people neglect garbage in their surroundings. Local environmental awareness need to be improved. Plastic open burning should be prohibited.

The next important issue is township management. People movement around the temples (e.g. souvenirs shop, restaurants, hawkers) should be restricted. Many shops around the temples can damage the essence of heritage value, sometimes, competition among the aggressive hawkers would definitely irritate to tourists. The accessible of tourists' coaches and other buses for going inside near the temples make challenge the strength of the ancient monuments. For sustainable development, it should be restricted or provide shuttle buses inside the ancient city would be the best option.

Bagan is relatively weak in several destination management factors such as multilingual signage, information center, free provision of destination map and other leaflets, ensured fitness of the rental vehicles (e.g. bicycle, e-bikes), more comfortable designed horse cart, meter taxi services, several money exchange service, English announcement in express buses, and well organized bus terminal. In addition, organized check point for collecting zone fees, crowded in seeing sunset spot, dangerous homeless dogs, sensitive on stained dollar bills, and low willingness of tourist police to assist are critical issues that destination managers need to solve. Slow internet service is the most frequent complaints. This issue is largely concern with the national level as it is happening over the country. Myanmar is just an open up country and everything has not ready yet while she is accepting such a figure of tourists in her history. It will take some times to address.

The last not the least issue is high overall price in destination. Since the country opened up in 2011, high demand for accommodations in high season is causing frequently unannounced price increases, considerable frustration for tour operators, generated negative media reports and poor value for money. Not only for accommodations but the overall price in Bagan are expensive (e.g. souvenirs, meals, transportation, and tourism activities). To address this, destination managers should consider standard price system for accommodation, transportation, at the same time, new projects for variety of accommodation facilities in order to ease high price for high demand.

Regarding to the destination image, Bagan possesses better image of local friendliness and less touristy than other destinations. Many tourists recommend that the friendliness and open nature of the local people is unique and this friendliness itself will assist to overcome some technological difficulties in destination. Bagan should keep and maintain this images for long term.

CONCLUSION

In today's competitive global market, the world is more and more integrated and complex, tourist are more educated, experienced and well-informed about global destinations through the widespread use of information technology. Traditional used of destination competitiveness models and set of indicators are seemed no longer provide complete results which show somewhat ambiguous in some studies. A highly competitive destination does not achieve by chance, creative strategies formulations are required to sustain destinations' competitiveness in market place over time. The present paper contributes methodology enhancement into destination competitive environment by providing a relative important insight of modifying and adapting the existing models into a new framework in a manner of putting together the relevant informations from studied places. By doing so, the researcher can gain a fundamental knowledge about studied destination thereby a broadly relevant and consistent radical and mainstream factors from the studied destination can be postulated into the conceptual framework.

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