



Is Competitiveness a Challenge for an Economy? A Comparative Study for Sri Lankan Tourism Sector

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Abstract

Tourism regarded as one of the fastest growing service industries for many economies and the main source of foreign income for appreciable number of developing nations. Further as vast human potential, national materials and multiple effects on areas of references, the sector acts as a stimulating factor for economic development. Tourism bonds people in leisure, that allows to inspire the nature, destinations, cultures, dreams they had and simply to inspire their own lives with traveling. The paper mainly focus on investigate the competitive position compared with the rival destinations, competitive advantage and specialization focus within the global tourism market and innovation driven strategies towards the national economy. Shift-Share Analysis applied and a novel Tourism competitiveness Index has proposed. Results indicate that Sri Lanka is in a mid-point as compared with regional Tourism leaders. The importance of customization of the regional tourism markets has highlighted as policy formulations for Tourism Development.

Keywords: *competitiveness; index; tourism*

1. Introduction

Tourism regards as a service industry with powerful economic source as globalization effects to increase the international trade, tourism flows and revenue generation within the regions of the globe. Tourism is an agglomeration of separate and related activities such as; transport, accommodation/lodging, heritage/cultural, entertainment, foods and beverages, hospitality, shopping, meditation and harmony, conventions and trade fairs, adventure, sports and recreation. Despite to the fact of the complexity, there are activities within a macroeconomic environment for the success of the tourism, as infrastructure, telecommunication, financial services, IT, health, education, energy, water and sanitary, security, law and order, political peacefully. Iordache et al.,(2010) pointed out the 'paradigm shift' of the tourism, as traditional tourism resources as climate, scenic beauty and attraction, culture and heritage become less important in making competitiveness, while strategic management of information and communication, ability of team-innovation and knowledge will way forward the tourism destination competitiveness. Development regard with the grass-root level in macro-economy, by linking vast variety of related industrial sectors on the way to provide much inspirable and innovative experience than traditional site-seeing and mass-tourism. Tourism accounts as fourth highest export category according to world ranks, in 2010 the global tourist arrivals were recorded as 935 millions (Economic review, 2011). Global tourism accounted US\$ 733 billion with an expected annual growth of 4.1% in 2020, as Asia – Pacific region is becoming the leader by capturing market shares of other destinations (Global Tourism Opportunities Research Study, 2009). International tourism is more concerned on branding the destinations and experienced-based traveling; herein the innovative promotional campaigns and image building are playing an important role. WTTC (2011) pointed out the Travel and Tourism sector is now in a recovering phase, as international tourists' arrivals picked up again in 2010 to pre-crisis peak level. According to the estimations, the tourism sector is directly responsible for the 5% of global GDP and 30% of the world's

services exports and creator of one in every twelve jobs, but WTO (2011) further pointed out, yet it was often underestimated by policy makers and scholars.

2. Literature Review

Tourism could consider as a wide-spread phenomenon and a vital economic development factor in present context, including competitiveness among regions to win tourists. More discretionary income levels and leisure time, created a foundation for modern life styles affiliated with travel and tourism. Tourism is an activity that consumer have to seek for the service, or should come to the destination mentioned by scholars (Miller and Gibson, 2005, Kvist et al., 2006), although in other economic activities, the product should reach the end-user, as tourism customer should reach destination itself, resulting a heavy impact on local/regional economic development. Bobirca (2007) pointed out tourism is the only service industry that have potentiality to provide trading opportunities in national wise regardless their level of development. The non-price factors also equally important as price related factors, as to gain competitiveness as on technical and efficiency factors, HR endowment, innovativeness, managerial and organizational factors, internal and external relationships with organizations, stakeholders and public sector.

Shift-share analysis is popular for regional economic comparative development analysis as well as employment growth comparisons, but it's also used as a useful managerial tool in tourism service sector. Scholars used this analysis as it measures change in a region's performance or country's performance relative with another country, economy or region as it popularized among researchers because of the fact the data requirement is relatively easy and inexpensive to obtain, yet provide the scholars, researchers and policy makers an useful information on regional economic performance (Sirakaya et al., 1995). Alavi and Yasin (2000) have used the shift-share analysis to examine the competitive advantage in Middle-East region as to shape up their tourism policy, as the approach is general in nature; scholars propose its applicability in any other region in the world to compare tourism competitiveness. Yasin et al., (2011) mentioned that the analysis method is a very good application on economic studies as well as widely using in analyzing the growth of economic variables. The major benefits have highlighted by various scholars as its applicable with secondary data and on the other hand, the limitations center through the concerns as temporal nature, theoretical content and predictive capabilities of the technique (Yasin et al., 2011). Shift-share analysis has mentioned by scholars (Vu and Turner 2011), (Chunyun et al., and 2007) as a useful management tool when applied to measure the competitive position or competitive effect between rival markets or regions. Comparatively the studies based on Sri Lankan Tourism Competitiveness is limited as service innovations play a vital role on destination management (Fernando, 2010, Fernando & Long, 2011). The Shift-Share Analysis applications could lead the sector towards competitive advantage and specialization within the regional markets (Fernando, 2013).

3. Research Question and Objectives

There are number of theoretical and empirical studies on tourism destination competitiveness by eminent scholars, although the studies based on developing nations are limited. In Sri Lankan context it's rarely examined the competitiveness and strategy development that covers the global tourism. Competitive advantage in the sector is no longer natural, but increasingly man-made phenomenon, driven by information technology, telecommunication and innovation, as such it is not simply the natural resources endowment that will determine its share in the tourism market, but how they manage and integrate with core competencies towards the competitive advantage. Hence it is worth to questioning "why many developing country destinations characterized by an abundance of natural resources and cost advantages, are not able to create wealth, prosperity and competitiveness in tourism". Hence the main research question has been developed as, "What are the strategies that way forward Sri Lanka as a competitive tourism destination within the region?" The main research question has further dived to sub-questions, as it covered the objectives that focus on this study.

- What is the competitive position of Sri Lanka as compared with the rival destinations?
- What is the present position of the competitive advantage and specialization focus within the glob-

al tourism market?

- What innovation driven strategies could implement on to contribute to the national economy?

Sri Lanka is a renowned tourism destination for beach tourism mostly because of island's exotic beaches, although it's the era to think beyond traditional boundaries by tapping into new market segments, to become a competitive global tourism destination. Hence, the primary objective of the study is to, *Identify the innovation driven strategies that would help to become Sri Lanka a competitive tourism destination within the global tourism market.* The secondary objectives are,

- Investigate the competitive position of Sri Lanka as compared with the rival destinations
- Identify the present position of the competitive advantage and specialization focus within the global tourism market
- Identify the innovation driven strategies that could implement to contribute to the national economy

4. Methodology

The paper aimed to measure the competitiveness position in Sri Lanka as a tourist destination among the rivals, as it also done by developing an index for the destination and find out the competitive advantage by tourists' arrivals within region wise, as to declare the present position on specialization or not non-specialization the base secondary data from various tourism statistics, as WTO, WTTC, UN statistics, World Bank and statistics in Sri Lanka have used. According to a survey done by the researcher in Sri Lanka during 2012 March-September period, rival destinations have selected.

5. Data Analysis

Proposed Index for Tourism Competitiveness

It proceed to create a "tourism competitiveness index" as to suite the Sri Lanka, by taking economic variables by taking the light of the study done by Croes (2010) , for small island tourism competitiveness by taking Caribbean islands. As the competitiveness index guided by two variables as, the satisfaction drives the demand for tourism and productivity refers as the creator of value in resources, although the index derived from the optimizing models as such; tourism destinations attempts to maximize tourism receipts. The three factors that used to develop the variables used in index are;

- Current performance in the global tourism market scaled by size (tourism receipts per capita in 2010 by US \$) – depicts the actual record of a tourism destination to face global competition
- Dynamism of performance overtime / growth rate (average tourism receipts growth rates from four years 2007-2010) – refers to the trend in performance through a time series
- Size of the industry base in the economic structure (tourism added value in GDP in year 2010) – refers the structural realities of a specific industry/sector

Index value will estimate on each variable on following formula, and the maximum and minimum values derived from the sample 7 countries, and each variable weighted in 40:30:30 suggested by Croes ,(2010), Wignaraja et al., (2004), as reflecting the importance of variable and size issue.

$$X_{ci} = \frac{X_{ci} - X_{c \min i}}{X_{c \max i} - X_{c \min i}}$$

Where c represent the country and i indicate the variable. The results indicated in table 1 below, and

that provides the 7 destinations of tourism, with their component indices with ranking and estimated competitiveness index. The sample destinations are the most competitive tourism destinations to Sri Lanka taken from the survey.

Table 1: The proposed Tourism Competitiveness Index

Country	Tourism competitiveness index	Rank	Tourism receipts per capita	Rank	Growth rate of tourism receipts	Rank	Tourism value added in GDP	Rank
			(per arrivals)		(average 2007-2010)		(2010)	
			US \$					
China	0.428	3	901.0132	6	4.9918135	5	499,941	1
India	0.601	1	2540.3393	1	6.3641833	2	117,892	2
Singapore	0.488	2	1547.9751	3	12.4930214	1	15,410	5
Malaysia	0.038	6	745.2089	7	2.3681294	6	28,975	4
Thailand	0.296	5	1468.8128	4	5.7003553	4	38,357	3
Sri Lanka	0.308	4	1596.3303	2	5.8487980	3	3,388	6
Maldives	0.035	7	901.5152	5	1.6198613	7	623	7

Data sources: World Bank Statistics 2011-2012; World Travel and Tourism Competitiveness Reports 2007-2011; Maldives Tourism Performance 2011

Shift-Share Analysis

Shift share analysis considered as a way to account for a regional competitiveness, by providing a picture of the performance of the industry mix in the region, to analyze as a comparative study. Shift-share analysis’s breaks down the regional growth for three sectors as National share (NS), Industry mix (IM) and Regional shift (RS). The analysis has used by scholars for tourism sector by denoting specific, (Alavi and Yasin 2000, Yasin et al., 2011) in similar comparative studies and the mathematical equation for analysis summon up accordingly. Under this formation , the actual growth in tourists arrivals to destination (j) from region (i) from the period 0 to period 1 is decomposed as in to four components as ; *Area-wide effect* ($T_{ij}^o(G_{AREA})$), *Region mix effect* ($T_{ij}^o(G_{iAREA} - G_{AREA})$), *Competitive effect* ($\check{T}_{ij}(G_{ij} - G_{iAREA})$) and *Allocation effect* ($(T_{ij}^o - T_{ij})(G_{ij} - G_{iAREA})$). Yasin et al., (2011) employed the Shift-Share Analysis Moroccan tourism competitiveness , with neighboring destinations as the benchmark economy. To asses the Sri Lankan tourism competitiveness with rival destinations, same method has used with competitive position and locational shifts with regard to regional markets by four components as Area-wide effect, Region-mix effect, Competitive effect and allocation effect. Tourism industry in country (j), receiving tourists from region (i) can be expressed as ;

$$T'_{ij} - T^o_{ij} = T^o_{ij}(G_{AREA}) + T^o_{ij}(G_{iAREA} - G_{AREA}) + \check{T}_{ij}(G_{ij} - G_{iAREA}) + (T^o_{ij} - T_{ij})(G_{ij} - G_{iAREA})$$

Actual growth = Area wide effect + region mix effect+ competitive effect + Allocation effect

Where, $G_{ij} = \frac{T^1_{ij} - T^0_{ij}}{T^0_{ij}} \text{ ----- (2.1)}$

$$G_{AREA} = \frac{T^1_{AREA} - T^0_{AREA}}{T^0_{AREA}} \text{ ----- (2.2)}$$

$$G_{i AREA} = \frac{T^1_{i AREA} - T^0_{i AREA}}{T^0_{i AREA}} \text{ ----- (2.3)}$$

$$T_{ij} = T^0_j \frac{T^0_{i AREA}}{T^0_{AREA}} \text{ ----- (2.4)}$$

The terms in the above equations are defined as,

- T_{ij}^1 = tourists arrivals to country (j) from region (i) at period 1 (i.e. the end of the period)
- T_{ij}^0 = tourists arrivals to country (j) from region (i) at period 0 (i.e. the beginning of the period)
- GAREA = overall growth rate in total tourist arrivals from all regions to the area from period 0 to 1
- T_j^0 = total tourists arrivals from all regions to country (j) at period 0
- T_{iAREA}^0 = total tourists arrivals from region (i) to area at period 0
- T_{iAREA}^1 = total tourists arrivals from region (i) to area at period 1
- T_{AREA}^0 = total tourists arrivals from all regions to area at period 0
- T_{AREA}^1 = total tourists arrivals from all regions to area at period 1
- G_{iAREA} = growth rate in tourists arrivals from region (i) to the area from period 0 to 1
- G_{ij} = growth rate in tourist arrivals from region (i) to the country (j) from period 0 to 1
- $\check{T}_{ij} = \tilde{T}_{ij}$ represents what the tourist arrivals to country (j) from region (i) would be if the structure and pattern of tourist arrivals from region (i) were equal to the benchmark

6. Results and Discussion

Sri Lanka as a tourism destination is able to secure its position of 4th among 7 tourism destinations as in a mid-point, to continue the growth strategies in development, while India getting first place, Singapore 2nd and China 3rd place accordingly. Sri Lanka has performed in growth rate of tourism receipts and tourism receipts per capita in terms 2007-2010 four years, but it is underperformed in tourism value added, while secured the 4th place according to the index. India (1:2:2) and Maldives (5:7:7) shows consistency among all three criteria's and it's a significant observation that Thailand is ranked behind Sri Lanka score for the 5th place and Malaysia 6th place .The overall results signals the strategies that Sri Lankan tourism sector, should way forward as, more added value in tourism sector in economy, by taking it as a national prioritized sector.

Table 2: Proposed Tourism Competitiveness Index

Country	Tourism competitiveness index	Rank
India	0.601	1
Singapore	0.488	2
China	0.428	3
Sri Lanka	0.308	4
Thailand	0.296	5
Malaysia	0.038	6
Maldives	0.035	7

According to the table 3 comparing Sri Lankan tourism with the rival destinations for the period of 2008-2010, it clearly indicates that “actual growth” was higher than the area wide effect of all regions except Africa. It mentions that growth in tourism in the country is higher than the growth share of rival countries. Accordingly Sri Lanka presently has the competitive advantage on attracting tourists from America, Europe, Middle East and South Asia regions while reflecting competitive disadvantage for African and East Asia /Pacific region. In contrast that reflects a remarkable opportunity because Europe occupied over 50% of market share in global tourism as well as Sri Lankan Tourism as to distribute the resources economically.

7. Conclusions and Policy Recommendations

Tourism is one of the fastest growing service industries for many economies, main source of foreign income, especially for appreciable number of developing countries. As further, by the vast human potential, national materials and through multiple effects on areas of references, tourism acts as a stimulating factor for economic development. It truly bonded people with leisure activities, that allows to inspire nature, destinations,

experiences, dreams they had in past and simply to inspire their own lives with traveling and culture of other nations. These study employees towards the objective of identifying the innovation driven strategies that would help to become Sri Lanka a competitive tourism destination within the global tourism market. The competitive position has investigated as comparative study, competitive advantage and specialization through Shift-Share Analysis.

Table 3: Shift-Share Results of Overall Tourism Arrivals Analysis with Sri Lanka (2008- 2010)

To	From	Actual growth	Area-wide effect	Region mix effect	Competitive effect	Allocation effect	Codes
Sri Lanka	Africa	-105	275	-425	75	-30	DS
	America	1422	3151	-1721	11517	1276	AN
	East Asia/Pacific	43617	7864	1468	148097	-113811	DS
	Europe	95628	22840	-5661	30875	47575	AN
	Middel East	20800	1954	3	7474	11369	AN
	South Asia	41839	15227	3996	5530	17085	AN
Thailand	Africa	8930	13926	-21494	18105	-1607	DS
	America	-64373	106375	-58116	-99896	-12736	DS
	East Asia/Pacific	560827	982514	183372	-695766	90706	AN
	Europe	465536	478959	-118722	65730	39568	AN
	Middel East	97229	41666	57	34348	21158	AN
	South Asia	284031	83237	21847	266260	-87312	DS
India	Africa	60666	15965	-24642	24043	45300	AN
	America	165893	125803	-68460	29738	79306	AN
	East Asia/Pacific	196073	101395	18924	305741	-229987	DS
	Europe	78885	228875	-56732	-44126	-49132	DS
	Middel East	16983	19473	26	-1207	-1310	DS
	South Asia	-4402	123089	32307	-58239	-101560	DS
Malyasia	Africa	-85746	14904	-23005	-120382	42737	AN
	America	-2696	40398	-22071	-74241	53217	AN
	East Asia/Pacific	2632366	2220261	43091	-1751	-526	DS
	Europe	107203	120068	-29762	63618	-46722	DS
	Middel East	-49715	25318	34	-115595	40528	AN
	South Asia	171128	96668	25371	95110	-46017	DS
Maldives	Africa	-66	666	-1028	318	-22	DS
	America	4116	1695	-926	8724	-5377	DS
	East Asia/Pacific	86875	14879	2777	246140	-176922	DS
	Europe	7861	58225	-14433	-8641	-27291	DS
	Middel East	2424	1077	1	1508	-163	DS
	South Asia	7695	3384	888	5867	-2444	DS
Singapore	Africa	-13952	9963	-15379	-9082	545	AN
	America	38844	66950	-36877	8280	191	AN
	East Asia/Pacific	1366732	791021	147633	424098	3980	AN
	Europe	64497	180758	-44805	-81980	10524	AN
	Middel East	6383	4487	6	7530	-5641	DS
	South Asia	69599	129809	34071	-62394	-31887	DS

Codes: A-competitive advantage, D-competitive disadvantage, S-specialized, N-not specialized

According to the comparative study, Sri Lanka is able to secure its position of 4th among 7 tourism destinations to continue the growth strategies in development as the post-war peaceful environment booming the sector. Sri Lanka has performed in growth rate of tourism receipts and tourism receipts per capita in terms 2007-2010 four years, but it is underperformed in tourism value added suggested that the innovations in products/services and moreover experiences should aligned. Shift-Share Analysis illustrate that Sri Lanka is not specializing the regions/ markets they already having competitive advantage by compared with other rival destinations in benchmark economy. Present context the country not specializing the America, Europe, Middle East and South Asia tourism markets reflects a huge loss of tourism flows to the economy.

The overall results signals the innovation-driven strategies with more added values to the sector should introduce, and image building and highlighting tourism as a national prioritized sector. Although customizing the tourism market as in region wise will incorporate with specialization with competitive advantage.

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