

Peculiarities of International Competition in the Market of Tourism and Hospitality

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ABSTRACT

The global hospitality and tourism market is being transformed through several core factors: new consumer needs of the industry, pandemic, increased competition, in particular the emergence of new regional tourism markets and new companies. **The aim** of the article is to investigate the competitiveness of the global hospitality and tourism market based on the example of key attractive tourism regions: Africa, the Americas, Asia, the Pacific, the Middle East and Europe. **The methodology** is based on a statistical analysis of regional hospitality and tourism markets by key indicators of their competitiveness in 2010–2021. **The results** show a significant contraction of the global hospitality and tourism market, with transformations in regional markets (Asia due to rising travel costs and restrictions, the Middle East due to rising costs of tourism services). The European hospitality and tourism market is found to be stable due to a slight increase in the cost of travel services and weaker regulatory restrictions introduced during the pandemic. The structure of the industry has changed between 2020 and 2021, with a growing share of regional markets in Europe, resulting in a change in international competition between regional tourism and hospitality markets. The key competitive advantages of European countries in the field of tourism are historical and cultural heritage, developed tourism infrastructure, level of service, safety, cost of tourism services, including transport and accommodation facilities. Despite the development of new regional tourism markets (Asia, Pacific, Middle East) due to increased prosperity and improved infrastructure, the pandemic has caused these destinations to stagnate due to increased costs of tourism services.

HIGHLIGHTS

- ① The aim of the article is to investigate the competitiveness of the global hospitality and tourism market based on the example of key attractive tourism regions: Africa, the Americas, Asia, the Pacific, the Middle East and Europe.
- ② The key competitive advantages of European countries in the field of tourism are historical and cultural heritage, developed tourism infrastructure, level of service, safety, cost of tourism services, including transport and accommodation facilities.

Keywords: Regional tourism markets, world tourism market, international tourism competitiveness, competitive advantages

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The global hospitality and tourism market is being transformed through several key factors: the pandemic causing market contraction; changes in travel consumer behavior; increased competition, in particular due to new regional tourism markets and new companies (airlines in the low-cost segment, tour operators with exclusive services, hotel chains, etc.). Air and sea travel (especially in the form of mega-ship cruises) were one of the main reasons for the rapid and global spread of the pandemic (Chinazzi *et al.*, 2020). Therefore, the spread of the virus led to the cessation of hospitality and tourism companies in many countries, international travel (and in some countries also domestic travel) almost ceased (Baum & Hai, 2020). The spread of the virus has also altered consumer demand patterns and tourist flows. Meanwhile, the pent-up demand for international tourism services in the future ensures a steady growth of the hospitality industry.

Given the above transformations, it is relevant to examine the trends and state of competitiveness of the global hospitality and tourism market, in particular under the impact of pandemic and restrictive government measures.

The aim of the article is to investigate the competitiveness of the global hospitality and tourism market on the example of major attractive tourism regions: Africa, the Americas, Asia, the Pacific, the Middle East and Europe.

Literature Review

The results of the World Economic Forum 2019 report, *Travel & Tourism at the Turning Point*, indicated a steady growth of the industry with increased competitiveness worldwide amid slowing adoption and improvement of infrastructure, sustainable tourism management practices (Calderwood & Soshkin, 2019). Among the drivers of global tourism and travel competitiveness in 2019, the growth of air travel industries, increased international openness and digital connectivity were crucial. (Rodríguez-López, Diéguez-Castrillón & Gueimonde-Canto, 2019). Improvements in air transport infrastructure have resulted in increases in route capacity and the number of airlines in developing countries (Martinez, Martín & Fernández, 2020). Progress in international openness (especially for low-income countries) and increased security in developing

countries have also been important factors in tourism growth. (Lopes, Muñoz & Alarcón-Urbistondo, 2018). Increasing use of the Internet has enabled an expanding number of people to access digital services in the travel and hospitality industry. Reduced travel costs and increased security have ensured increased price competitiveness of tourism, notably compared to 2017 (Kumar & Dhir, 2020; León, Guerrero & Caballero, 2022). The key development factor of the global tourism and hospitality market competitiveness A factor in the development of competitiveness of the global hospitality and tourism market is also a greater level of perception of the industry by stakeholders, including governments of different countries. Tourism competitiveness is related to human development, which significantly affects the development of the industry (Croes, Ridderstaat & Shapoval, 2020). This is evidenced by recent trends in hospitality and tourism development: tourists are increasingly attracted by culture, history, nature, religion as factors of competitiveness, “national identity”. Stakeholders’ awareness of the main attractive “zones” for tourists promotes tourism at both national and international level. As a consequence, the level of funding for industry development is increasing. Marketing campaigns to promote tourism in different countries are becoming more efficient. For instance, the government of Saudi Arabia is launching a government website to promote local destinations around the world (historical, archaeological, cultural, religious, natural identified places). China, in cooperation with Ukraine, relaxed entry conditions for Ukrainian citizens in the run-up to the pandemic to stimulate tourist flows to the country and promote the country’s own national brand through exposure to culture, nature, local values and everyday life.

Among the major challenges for international competition in the global hospitality and tourism market is the outstripping growth in demand for transport services, especially air transport, compared to the growth of infrastructure capacity. With growing tourist flows in some developing countries, the need to preserve cultural and natural values and to develop local transport and tourism routes is also a challenge. (Rodríguez-Díaz & Pulido-Fernández, 2021).

Methodology

This study provides a statistical analysis of the global hospitality and tourism market development using selected tourism regions: Africa, the Americas, Asia, the Pacific, Europe and the Middle East for the period 2010–2021. The tourism regions are compared on the following indicators of their international competition in the global environment:

1. international tourism arrivals, million;
2. international tourism receipt, USD billion;
3. receipts per arrival, dollars;
4. share of tourism in total export, %;
5. accommodation capacity and occupancy rate;
6. accommodation demand.

To analyze the impact of the pandemic on the competitiveness of tourism regions, these indicators are examined for the years 2019, 2020–2021. The level of pandemic restrictions in different regions of the world as at 13 August 2022 was analyzed by region and type of restrictions:

1. Air Travel.
2. Regulations.
3. Restrictions at the destinations.

RESULTS

Since the pandemic outbreak, the global hospitality and tourism market has been significantly transformed. The level of competition in different markets and industry segments has been impacted by the fiscal, monetary and restrictive policies adopted by governments in different countries, depending on the level of disease in each country. The spread of the pandemic has changed the international competition of regional tourism and hospitality markets due to the different levels of disease and restrictions imposed.

In 2011, international tourist arrivals were 1,004 million worldwide (Table 1) and the growth rate for 2010–2011 was 5% (5% in 2012, 4% in 2013, 4% in 2014, 5% in 2015, 3% in 2016, 7% in 2017, 6% in 2018 and 4% in 2019). In 2020, international

Table 1: Key tourism indicator by region, 2011–2021

	Years				Absolute growth, %	
	2011	2019	2020	2021	2021–2011	2021–2019
International tourism arrivals, million						
Africa	50,2	73,25	20,3	21,45	-28,75	-51,8
America	160,64	219,75	64,96	68,64	-92	-151,11
Asia and the Pacific	220,88	366,25	89,32	94,38	-126,5	-271,87
Europe	522,08	747,15	211,12	223,08	-299	-524,07
Middle East	50,2	73,25	20,3	21,45	-28,75	-51,8
Total	1004	1465	406	429	-575	-1036
International tourism receipt, USD billion						
Africa	35,97	44,49	16,44	18,51	-17,46	-25,98
America	239,8	326,26	126,04	141,91	-97,89	-184,35
Asia and the Pacific	323,73	444,9	126,04	92,55	-231,18	-352,35
Europe	527,56	578,37	235,64	308,5	-219,06	-269,87
Middle East	71,94	103,81	43,84	61,7	-10,24	-42,11
Total	1199	1483	548	617	-582	-866
Receipts per arrival						
Africa	647	572	796	858	211	286
America	1451	1505	1799	1697	246	192
Asia and the Pacific	1347	1228	2132	4555	3208	3327
Europe	934	771	998	1067	133	296
Middle East	1388	1352	2179	3152	1764	1800
Share of tourism in total export, %						
Africa	7 %	9 %	4 %	4 %	-3 %	-5 %
America	7 %	9 %	4 %	4 %	-3 %	-5 %
Asia and the Pacific	5 %	6 %	2 %	1 %	-4 %	-5 %
Europe	6 %	6 %	3 %	3 %	-3 %	-3 %
Middle East	7 %	12 %	8 %	8 %	1 %	-4 %
Share of tourism in total export, %	6 %	7 %	3 %	3 %	-3 %	-4 %

Source: UNWTO (2022a).

tourist arrivals will drop by 72% or 575 million people (to a volume of 406 million). In 2021, international arrivals are at 429 million, down 71% from 2019. Tourism revenue is also down in 2020–2021 compared to 2019 (down 63% in 2020 and 58% in 2021). However, Asia and the Pacific saw a greatest decline in tourism revenues (72% in 2020 and 79% in 2021 compared to 2019). Europe and the Middle East experienced the smallest decline in revenues.

In the global tourism market, European countries lead the way due to their developed industry and competitive advantages such as historical and cultural heritage, developed tourism infrastructure, level of service, safety, cost of tourism services including transport and accommodation, and lodging. Consequently, while tourist arrivals in Europe were \$1,067, second only to Africa (\$858 per arrival), tourist arrivals in the Americas were \$1,697, in Asia and the Pacific \$4,555 and in the Middle East \$3,100. In the Middle East, it was \$3,152, while in Asia and the Pacific it was \$4,551 and in the Middle East \$3,152, respectively. However, the figure rose substantially in Asia and the Pacific by \$3,208 between 2011 and 2021, making these countries less attractive for tourists. However, the rate in Asia increased significantly precisely during the pandemic. In comparison, in Europe the figure increased by \$133 for the years 2011–2021 and \$296 for 2019–2021. This difference in arrival receipts is due to the cost of transport and travel time respectively. Asia-Pacific will be attractive as a tourist destination for some high-income segments seeking a tourism customer experience. That said, customer experience is one of the pivotal consumer trends in the hospitality and tourism industry. Therefore, we should expect

growth of tourism volumes in new markets: Middle East, Asia and Pacific, which will be due to growth of these countries, economic growth, and change in tourist preferences. Traditional European countries, however, still continue to occupy a leading position in the global tourism market.

The pattern of arrivals is also changing: between 2010 and 2019, Europe traditionally held the top spot in tourist arrivals with a share of 52%. Asia and the Pacific had a share of 22%, America 16%, Africa 5% and the Middle East 5%. In 2020–2021 the share of tourist arrivals in Europe begins to increase: in 2020 to 59% and in 2021 to 67%. The share of arrivals to other regions is also changing, transforming the structure of international tourism and the hospitality industry. In 2020, the Americas account for 17% of tourist arrivals, Asia and the Pacific for 15%, and the Middle East and Africa for 5% each, respectively. In 2021 the Americas share is 19%, Asia Pacific 5%, Middle East 5% and Africa 4%. This drop is due to a significant increase in the cost of travel to Asia and the Pacific in 2020–2021, which has caused the share of exports from the tourism sector in this region to fall from 6% in 2019 to 1% in 2021. The share of exports from tourism declined less in the Middle East by 4% in 2019–2021, due to the high incidence of disease control in the region.

According to UNWTO, as of 13 August 2022, the highest level of air travel restrictions in different regions is in Asia and the Pacific at 80%, Africa at 85%, the Middle East at 57% and the Americas at 56%. Restrictions on air travel include the Covid-19 test (on average 43% of countries worldwide, the highest in Africa 74%, Asia 49%, the Americas 42%, Europe 11% and the Middle East 39%), entry restrictions (on average 4% complete restrictions worldwide and 5% private restrictions), flight

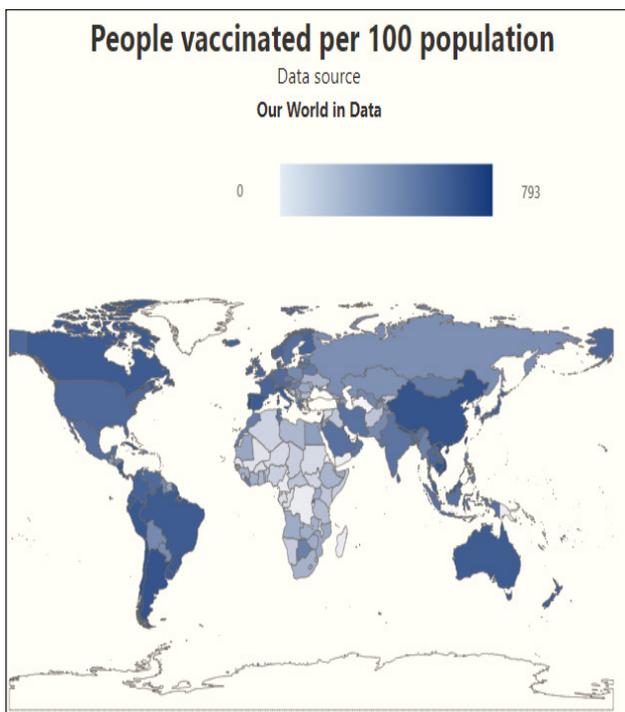
Table 2: Level of pandemic spread restrictions in different regions of the world, 13 August 2022

Region	Air Travel			Regulations			Restrictions at the destinations		
	Full	Some	No measures + No available	Full	Some	No measures + No available	Full	Some	No measures + No available
Africa	0 %	85 %	15 %	6 %	72 %	22 %	0 %	8 %	92 %
America	0 %	56 %	45 %	4 %	50 %	46 %	0 %	8 %	92 %
Asia and the Pacific	4 %	80 %	16 %	19 %	51 %	30 %	8 %	16 %	82 %
Europe	0 %	20 %	80 %	0 %	69 %	31 %	0 %	6 %	94 %
Middle East	0 %	57 %	43 %	8 %	75 %	17 %	0 %	7 %	93 %
Total	4 %	59 %	37 %	8 %	61 %	31 %	2 %	9 %	91 %

Source: UNWTO/IATA (2022 b).

interruption (95% of countries worldwide have no restrictions) and quarantine (complete quarantine in 15% of countries, partial in 4% of countries and none in 77% of countries). In European countries the level of restrictions on air travel is 20%. The highest level of regulatory restrictions is in the Middle East at 75%, Africa at 72% and Europe at 69%, while in the Americas it is 50% and in Asia 51%.

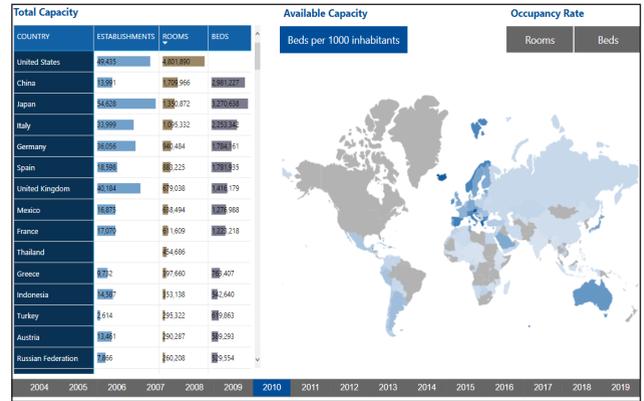
It should also be noted that the vaccination rate is highest in the following countries: UAE – 106.7 per 100 inhabitants, Samoa – 105.3, Qatar – 103.6, Brunei – 100.9, Cuba – 95.1, Portugal – 94.8, Chile – 92.7, Singapore – 92.1, Vietnam – 92, Cambodia – 91.5 (Fig. 1).



Source: UNWTO/IATA (2022 b).

Fig. 1: Vaccination rate of the population in the world per 100 individuals, 13 August 2022

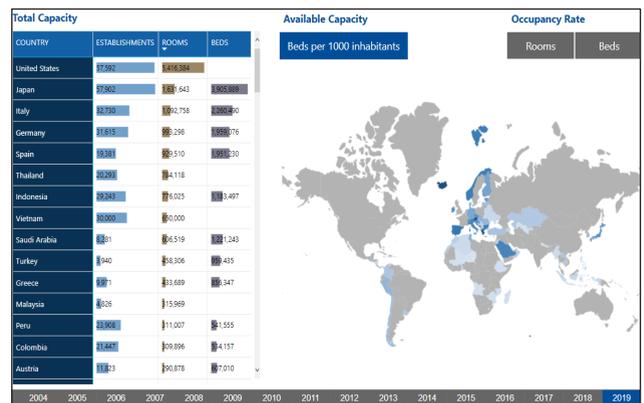
It is worth noting some transformations of the tourism market over 2010–2019 in terms of capacity (availability of accommodation and settlements per 1,000 inhabitants in different countries). In 2010, the leading countries in terms of available capacity (Fig. 2) were the USA, China, Japan, Italy, Germany, Spain, UK, Mexico City, France, Thailand, Greece, Indonesia and Austria.



Source: UNWTO (2022 c).

Fig. 2: Accommodation Capacity and Occupancy Rate, 2010

In 2019, the world leaders in terms of available capacity (number of beds per 1,000 inhabitants) were Japan, Italy, Germany, Spain, Thailand, Indonesia, Vietnam, Saudi Arabia, Turkey, Greece, Malaysia, Peru, Colombia and Austria. These countries are the most attractive destinations for tourists. In 2019, available capacity in Europe was highest in Italy, Germany, Spain, the UK, France, Greece, Turkey, Austria and Switzerland (number of beds per 1,000 inhabitants). In 2019, Italy, Germany, Spain, Turkey, Greece, Austria and Portugal remain the leaders in this indicator.



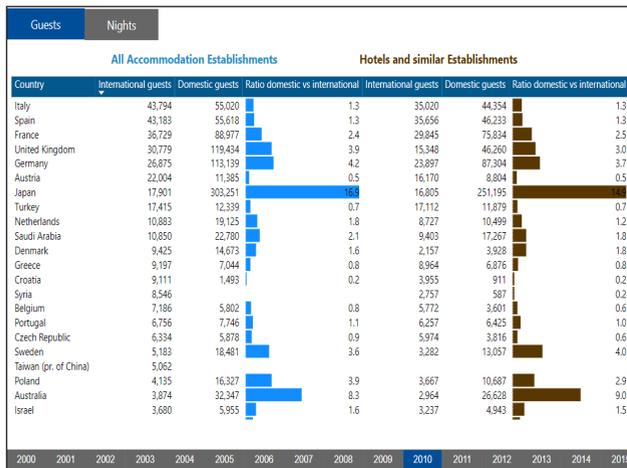
Source: UNWTO (2022 c).

Fig. 3: Accommodation Capacity and Occupancy Rate, 2019

Meanwhile, in terms of room occupancy rates in 2010, the leading countries were Angola (89%), Australia (66%), Egypt (70%), China (60%), Saudi Arabia (59%), France (59%), Spain (53%), Mexico City (49%) and other countries. In 2019, room occupancy rates were highest in Spain (67%), Thailand (70%), Germany (63%), Italy (55%), Indonesia (55%), Japan (63%), Norway (56%), Finland (55%), Colombia

(58%). Due to the lack of data on settlement capacity and occupancy rates, it is difficult to compare the competitiveness of countries.

In terms of demand indicator in 2010 among foreign visitors of all accommodation types, the leading countries were Italy, Spain, France, Great Britain, Germany, Austria, Japan, Turkey, the Netherlands, Saudi Arabia, Denmark, Greece and Croatia (Fig. 4). This means that countries in Europe were the most competitive tourist destinations in 2010. Leaders in terms of the ratio of domestic to foreign tourists were Turkey, Australia, Poland, Germany, the UK, Sweden and Saudi Arabia.



Source: UNWTO (2022 d).

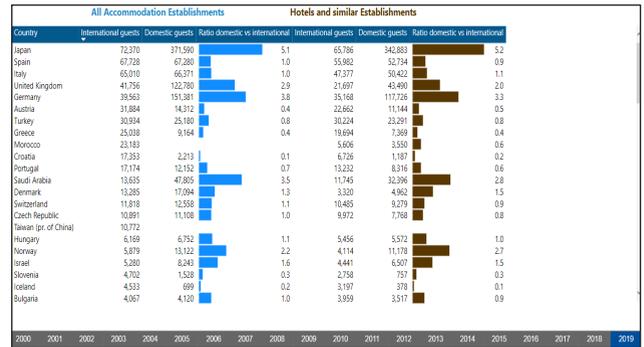
Fig. 4: Accommodation demand, 2010

In terms of demand indicator in 2019 among foreign visitors of all accommodation types, the leading countries were Japan, Spain, Italy, Great Britain, Germany, Austria, Turkey, Greece, Morocco, Croatia, Portugal, Saudi Arabia and Denmark (Fig. 5). Meanwhile, the leaders in terms of the ratio of domestic to foreign tourists were Japan, Germany, the UK, Saudi Arabia and Norway. This can be attributed to the increasing income of the different countries' populations, which allows not only for travel within the country (as was the case in Turkey), but also for travel to other countries.

Thus, economic growth and rising incomes of citizens contribute to the development of the global hospitality and tourism market. This can be seen in two key ways:

1. firstly, with economic and income growth, citizens of certain countries are able to travel to other countries;

2. secondly, economic growth and societal development make certain countries attractive to citizens of other countries.



Source: UNWTO (2022 d).

Fig. 5: Accommodation demand, 2019

Among the trends in the global tourism and hospitality industry is the growing popularity of new destinations which, unlike traditionally attractive European countries, are becoming new centers of gravity due to the changing needs of tourists due to the rising standard of living in developing countries. These destinations include Turkey, Cyprus, Morocco, Saudi Arabia, UAE and China, where economic development has contributed to their emergence as new tourist destinations with a distinctive culture that attracts tourists.

DISCUSSION

Bazargani & Kiliç (2021) conclude, based on a study of the relationship between tourism competitiveness and tourism productivity, that competitiveness is the main driver of tourism flows, tourism's contribution to GDP for different regions and income groups of regions in different countries. However, competitiveness has a heterogeneous effect on productivity depending on tourism region, income level in a group of countries, and regional tourism performance. Infrastructure is a key driver of tourism productivity. Other important factors are political conditions, the enabling environment, and natural and cultural resources that influence tourism performance. A study by Nisthar, Mustafa & Ismail (2019) reveals an inverse relationship between regional travel and tourism competitiveness index rankings in 37 European countries and the following variables: tourism services infrastructure, land and port infrastructure, business environment, travel and

tourism prioritization and cultural travel resources. The results of Romão (2020) confirm the positive impact of tourism demand, supply and specialization on the added value created by tourism activities in European countries. The qualification of the regional workforce and the dynamics of innovation (investment in research and development) affecting tourism competitiveness also have a marginal positive impact on tourism in Europe. Furthermore, Romão (2020) found a significant potential for the impact of the geographical, cultural and institutional proximity of Europe's tourism regions on tourism and the hospitality industry through strategies of intellectual specialization of the tourism sector.

Rodríguez-Díaz & Pulido-Fernández (2019) proved the link between sustainable tourism development and tourism competitiveness through the measurement of the Tourism Competitiveness Index. The sustainable development approach applied to tourism is emerging as the dominant paradigm, becoming a new requirement for achieving the competitiveness of the hospitality and tourism market. This study also identifies a similar correlation using the example of traditionally top-ranking European countries in terms of tourism development indicators. In the context of this study, sustainability can be seen through the international tourist arrivals figures, the share of which compared to other regions has increased from 52% in 2019 to 67% in 2021. This means that sustainability, ensured in particular by effective regulation of the tourism industry during a pandemic and effective policies to regulate restrictions, is a competitive advantage for the tourism industry. That being said, it should be noted that the sustainability of tourism in Europe can also be measured in terms of revenue per arrival, which did not increase significantly during the pandemic compared to Asian countries. As noted by Liu, Cheng & OuYang (2019), the level of risk management affects the competitiveness of tourism by determining a country's ability to compete in the international market. This means that the management of the tourism industry during the pandemic was one of the factors that had an impact on the competitiveness of tourism and hospitality. Sharp comprehensive restrictions in some countries have had a negative impact on tourism flows and need to be reconsidered.

An essential factor in the competitiveness of

regional tourist gravity centers (European countries) is the level of well-being of the local population, cultural, environmental, social living conditions. Similar conclusions can be found in (Perles-Ribes *et al.* 2020), where the authors prove this link using two Spanish regions as examples. In the context of this study, it should be noted that it is not only the level of well-being of the local population that attracts tourists, but also the level of tourist spending in the destination. In European countries the revenue per arrival has remained relatively unchanged. Whereas in Asian, Middle Eastern countries the figure has risen rapidly, which has become a constraint to the growth of tourist flows. At the same time, the high cost of stay in Asia and the Middle East is associated with a higher labor intensity of tourism services (Romão & Nijkamp, 2019) and the level of innovation, as these regions are relatively new tourism hubs due to economic growth and improved quality of life.

Baum & Hai (2020) have identified the negative impact of the pandemic on the hospitality and tourism industry in parts of Asia, Europe and North America. This study identifies a contraction of the tourism sector in all regions and a reduction in the level of competitiveness of individual regions in terms of travel costs between 2020 and 2021. Despite the new demands, particularly among Millennial tourists (Veiga *et al.* 2017), traditionally the most attractive tourist destination is Europe, in particular because of the cost of travel. Arguably, in the future, new technologies and a new generation of digital skills will contribute to the competitiveness of new tourism regions in developing countries. However, during the pandemic, the cost of travel and restrictions has become a determining factor for the tourism industry in different regions and its competitiveness. That said, it should be noted that the adoption of technology in the hospitality and tourism industry has increased during the pandemic. As Liu-Lastres, Wen & Huang (2022) argue, the pandemic was a catalyst for making the sector technology-intensive and for addressing a number of challenges in the sector, particularly those related to labor. Hence, technology in some parts of the world can be a new competitive advantage for the hospitality industry. However, the pandemic in some countries has caused a dramatic decline in the tourism sector (Ranasinghe, 2020) due

to the unpreparedness of enterprises to manage the impact of the virus. Ioannides & Gyimóthy (2020) note that analysis of recent recovery processes of the tourism sector from the crisis due to the pandemic indicates a further recovery from the sudden market shock, primarily due to various forms of government intervention. However, this study shows that recovery may be delayed due to the presence of different types of restrictions in different tourism regions and rising tourism costs, especially in Asia and the Middle East.

CONCLUSION

The article reveals a significant contraction of the global hospitality and tourism market (72% in 2020–2021 compared to 2019), the presence of transformations in regional tourism markets due to changes in demand. In particular, the regional tourism market in Asia has experienced an increase in travel costs. The stability of the hospitality and tourism market in Europe has been ensured by modest increases in travel costs and weaker regulatory constraints imposed during the pandemic. The structure of the industry has changed between 2020 and 2021, with a growing share of regional markets in Europe, resulting in changes in the international competition of regional tourism and hospitality markets. The key competitive advantages of European countries in the field of tourism are historical and cultural heritage, developed tourism infrastructure, level of service, safety, cost of tourism services, in particular transport and accommodation facilities. Despite the development of new regional tourism markets (Asia, Pacific, Middle East) due to increased prosperity and improved infrastructure, the pandemic has caused these destinations to stagnate due to increased costs of tourism services. Countries in Asia and the Pacific will be attractive as tourist destinations for certain segments of high-income tourists seeking a tourist customer experience. Meanwhile, customer experience is one of the key consumer trends in the hospitality and tourism industry. Economic growth and rising incomes of citizens, especially new regional tourism markets, will contribute to the development of the global hospitality and tourism market. Today, this can be seen in two key directions:

1. firstly, with economic and income growth, citizens of certain countries can travel to other countries;
2. secondly, economic growth and societal development makes certain countries attractive to citizens of other countries.

Among the trends in the global tourism and hospitality industry is the growing popularity of new destinations, which, in contrast to the traditionally attractive European countries, are becoming new centers of gravity. This trend is driven by changing tourist needs related to the desire for an unforgettable customer experience. In addition, changing needs are caused by rising standards of living in different countries, including developing ones. These include Turkey, Cyprus, Morocco, Saudi Arabia, UAE, China, where economic development has contributed to their emergence as new tourist destinations with a distinctive culture that attracts tourists. Meanwhile, infrastructure is a key driver of tourism productivity and competitiveness, especially during a pandemic. Other important factors are political conditions, the enabling environment, and natural and cultural resources that influence tourism performance.

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