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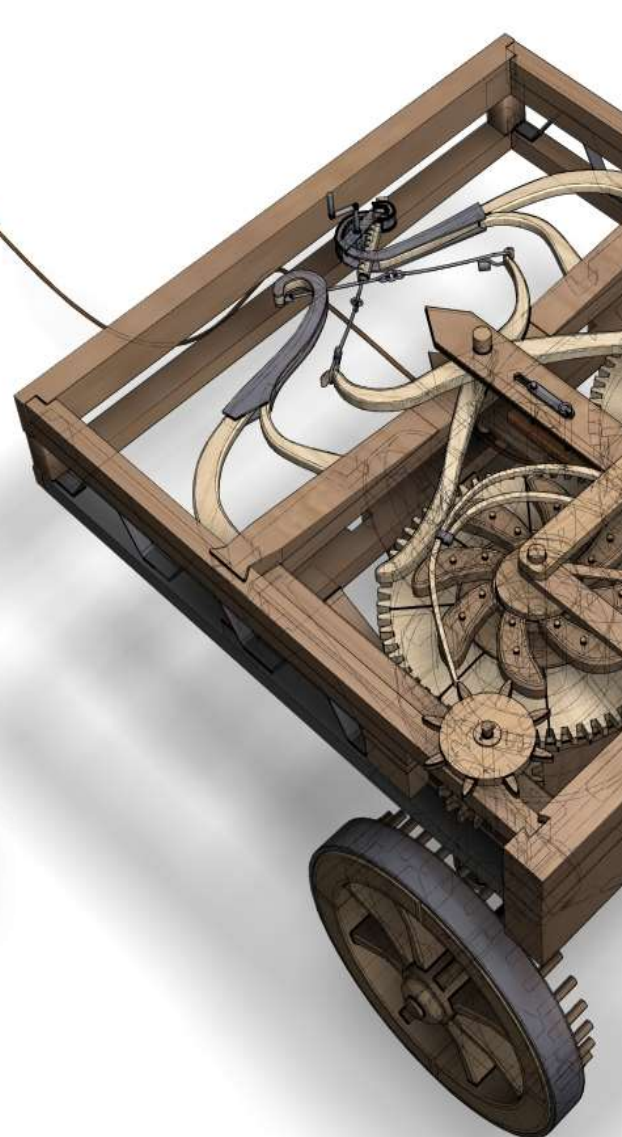
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Journal of Environmental Management and Tourism is an interdisciplinary research journal, aimed to publish articles and original research papers that should contribute to the development of both experimental and theoretical nature in the field of Environmental Management and Tourism Sciences.

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Calm before the Storm in the European Tourism Sector: Pre-COVID-19 Multivariate Competitive Position Analysis in the 2011-2019 Period

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Abstract

The impact of tourism on GDP results, inter alia, from the creation of various jobs in the widely understood tourism sector, as well as from travels made both by citizens within their country and by foreigners. Such travels entail expenditure on various goods and services. The coronavirus pandemic that broke out in 2020 caused significant losses in the economic area in all European Union (EU) countries. The restrictions implemented in connection with the pandemic affected the tourism sector the most.

The aim of this paper is an assessment of the competitive position of EU27 countries from the tourism sector perspective. The study is based on the analysis of the competitive position of the tourism sector in EU member countries in the pre-COVID era, which is why the research period was 2011-2019. The tool for achieving this objective was a multivariate comparative analysis. The position can be assessed on the basis of various sub-measures, but this does not give a complete picture, only a fragmented one. Our goal was to show the picture holistically - proposing the SMD methodology.

The conclusions of the study show that there is differentiation that persists over the long research period. The positions of individual countries are maintained. The same countries occupy both top and bottom positions. COVID-19 is a new factor, not included in the analysis, which may affect the results of such analyses in the future, both in short- and long-term perspective. In this context, our results can provide a starting point and a benchmark for assessing these developments in the coming years.

Keywords: tourism sector; competitive position; European Union; multivariate comparative analysis.

JEL Classification: O11; Z31; Z32.

Introduction

The coronavirus pandemic that broke out in 2020 caused significant losses in the economic area in all European Union (EU) countries. The average fall in GDP across the European Union in 2020 is estimated at 6.4% (Eurostat 2021a). However, the severity of the impact of the pandemic varied across the EU, ranging from the smallest

drop in GDP of 2.2% in Lithuania to a 12.4% drop in GDP in the case of Spain (Statista 2021). There was a similar variation in the negative impact of the pandemic for individual economic sectors in all EU countries. The restrictions implemented in connection with the pandemic affected the tourism sector the most. Estimates of the number of businesses operating in the EU in this "industry" indicate over 2.3 million entities employing more than 12 million people, and the volume of GDP generated by tourism is estimated at 3.9% of GDP in the entire EU, with direct employment of 5.1% of economically active people (European Commission 2001). However, this estimate only takes into account entities directly involved in tourism activities. Taking into consideration the links between the different actors and considering their interdependence, in 2018, the impact of tourism on GDP was estimated to be 10.3% of the volume of total GDP and 11.7% of total employment in the EU (European Parliament 2021; Eurostat 2021b).

This significant contribution of the "tourism industry" to the potential of the EU economy as a whole has been reflected in a number of guidelines on the direction of the industry over the recent years, e.g.:

- "Agenda for a sustainable and competitive European tourism" of 19 October 2007, which presents the option of sustainability as a means of ensuring the long-term competitiveness of tourism and announces a three-year preparatory action (European Commission 2007);
- "Europe, the world's No 1 tourist destination - a new political framework for the European tourism sector", 30 June 2010, which analyses the factors contributing to the competitiveness of European tourism and the obstacles to its sustainability (European Commission 2010);
- "Implementation and development of visa policy to boost economic growth in the EU" of 7 November 2012, which expressed the intention to increase the flow of tourists from third countries by introducing a common visa policy (European Commission 2012);
- "European Strategy for Growth and Jobs in Coastal and Maritime Tourism" of 20 February 2014, which aims to promote the sustainability and competitiveness of maritime and coastal tourism (European Commission 2014).

These are only some of the regulations on the guidelines for the development of tourism that have been drawn up in the recent years. It seems that, because of the importance of this sector to the entire EU, it will be essential to launch programs to support the recovery of tourism in the aftermath of the pandemic - it is forecast that by the end of 2023, the level of tourism services will not have returned to pre-pandemic levels. At the same time, however, attention should be paid to the problem associated with the excessive growth of tourism in certain regions of the EU, which, in turn, has negative social consequences - the phenomenon of over-tourism, consisting of an excessive number of tourists visiting certain destinations. Given the development of the concept of sustainable and responsible tourism, it would be important to classify the different EU countries in terms of the current importance of tourism for their economies.

The aim of this paper is an assessment of the competitive position of EU27 countries from the tourism sector perspective. The study is based on the analysis of the competitive position of the tourism sector in EU member countries in the pre-COVID-19 era, which is why the research period was 2011-2019. Natural restrictions on tourism at the end of 2019 for fear of COVID-19 infection and then, from 2020 onwards, restrictions imposed by individual countries have affected global tourism. The global pandemic of COVID-19, declared by the World Health Organization on March 11, 2020 (WHO 2020), was caused by coronavirus SARS-CoV-2, first identified in December 2019 in the Chinese city of Wuhan. By June 15, 2021, over 176 million of COVID-19 cases and over 3.8 million deaths caused by this disease were confirmed by the World Health Organization (WHO 2021).

1. Competitive Position of the Tourism Sector

Among many European Union activities, tourism is the major one. The main reason for it is that the tourism sector has a significant impact on economic growth, social development, and it can be a powerful tool in fighting economic decline and unemployment. Employing over 12 million people, this sector generates a total of EUR 356 billion in annual revenue to the European economy and represents over one third of the maritime economy (European Commission 2021b). Nevertheless, at the moment the tourism sector faces a series of challenges. The COVID-19 pandemic and lockdowns of European economies have had a huge impact on the industry. The European Commission works to address these challenges with various policies and actions. In June 2010, the European Commission adopted the Communication, "Europe, the world's No. 1 tourist destination – a new political framework for tourism in Europe" (European Commission 2010). This communication set out a new strategy and action plan for EU tourism. The EU's competence in tourism is one of support and coordination to supplement the actions of member countries. The main challenges for the European tourism industry are: security and safety; economic competitiveness; technological; markets and competition. In this document, four priorities

for action were also identified: (1) to stimulate competitiveness in the European tourism sector, (2) to promote the development of sustainable, responsible, and high-quality tourism, (3) to consolidate Europe's image as a collection of sustainable, high-quality destinations, (4) to maximize the potential of EU financial policies for developing tourism.

The subject of this article is the competitive position of tourism in European countries, so it is crucial to define this concept. For this purpose, it seems necessary to organize the terminology in this field. Terms such as: tourist potential, tourist attractiveness, competitiveness, and competitive position appear in the context of the evaluation of tourist regions (by which we can also understand countries). Although they are all closely related, they refer to different issues. Thus, tourism potential can be understood as all resources of the natural and cultural environment, transport accessibility, tourism infrastructure, human resources, and elements of the tourism sector's surroundings that make it possible to take action to achieve the intended goal in the field of tourism (Borkowska-Niszczota 2004, 313). It is the foundation for creating a tourist product and a competitive advantage of a tourist region (country), and also largely determines the competitive position achieved by that region. Tourist attractiveness is defined as the degree to which the local tourist offer meets the needs and expectations of tourists (Cracolici and Nijkamp 2008, 337; Vengesai 2009, 622). The question of defining the notion of competitiveness of a tourist region (country) is a little more complicated.

Although the phenomenon of competitiveness itself and its various aspects are often discussed in literature (e.g. Feurer and Chaharbaghi 1994; Grant 1991; Krugman 1996; Porter 1990; Siudek and Zawojka 2014), as well as in documents and studies of international institutions and organizations (e.g. European Commission 2021a; OECD 2013; WB 2020; WEF 2019), it is difficult to indicate one, universally accepted definition. This is certainly due to the multidimensionality and complexity of this concept. The concept of competitiveness may refer to national economies, as well as regions and industries or enterprises. Hence, we can distinguish three categories of competitiveness that appear in the literature: macro-competitiveness (national economy level), meso-competitiveness (sector/regional level) and micro-competitiveness (enterprise level) (e.g. Daszkiewicz 2008; Maniak 2005; Skawińska and Zalewski 2009, 44- 48). From the point of view of the subject of the article, the approach that can be found in the definition of Kim & Marion (1997, 337) is relevant. It states that international competitiveness is the permanent ability of an industry or companies to compete with foreign counterparts on foreign markets as well as on domestic markets, under conditions of free trade. A similar approach is presented in the definition of competitiveness as the ability of companies forming a given industry to operate profitably in an open market, in an interregional or international dimension (Maniak 2005, 14). In the literature on the subject, there is a distinction between competitiveness in terms of factors and results. It indicates the complexity of the process of assessing the competitiveness of a sector or industry that is usually carried out by comparing it with a similar department in another region or country (Łukiewska 2019, 26). The factor approach focuses on the determinants of competitiveness - activities creating the basis for effective competition, and the result approach - on the results, e.g. in the form of market share, achieved economic results (Stankiewicz 2002, 37; Gorynia and Jankowska 2008, 54). The latter meaning is close to the notion of competitive position, understood as the result of an assessment in relation to competitors (Skawińska and Zalewski 2009, 49) and that's how this term is understood in this article.

The explanation given above shows the close link between the concepts mentioned, and in particular between competitiveness and competitive position. It is worth noting that issues like: the competitiveness of tourist regions (countries), the problem of its assessment and tourist regions positioning in relation to competitors appear in various types of scientific publications (e.g. Águas *et al.* 2010; Bednárová *et al.* 2018; Chin *et al.* 2017; Kunst and Ivandić 2021; Önder *et al.* 2013; Sánchez and López 2015; Sotiriadis and Varvaressos 2015; Teodorović and Popesku 2017). These issues are also of interest to the institutions and organizations dealing with tourism in the international (e.g. Annoni and Dijkstra 2019; UNWTO 2021; WEF 2021; WTTC 2021) and national (e.g. GUS 2021; POT 2021) dimensions.

2. Methodology

The research period covers the years 2011-2019 and its choice was determined by two factors. The first was the intention of the authors to cover the entire decade; however, due to the significant change in the conditions for the functioning of tourism in connection with the emergence of the COVID-19 pandemic and lockdowns, it was decided to end the analysis on the data for 2019. The second important factor influencing the study period choice was the availability of data necessary for each of the matrices.

During the period under investigation an important change took place: the accession of Croatia in 2013. Additionally, in 2016 United Kingdom decided to leave the European Union – the exit process was completed in January 2020. The analysis covers 27 countries – members of the EU as of December 31, 2020.

The selection of indicators to assess the competitive position of the tourism sector in each country was subjective, taking into account the availability and completeness of data. The research was based on data included in the Eurostat database (Eurostat 2021c). In the next step of the research, the analysis of data completeness was performed. As a result, based upon their completeness and contents, out of all the indicators concerning tourism available for 27 objects (EU countries) in the Eurostat database, 5 datasets were chosen:

1. Number of trips [duration: 1 night or over];
2. Number of nights spent by country / world region of destination [duration: 1 night or over];
3. Number of establishments, bedrooms and bed-places [classification of economic activities - NACE Rev.2: Hotels; holiday and other short-stay accommodation; camping grounds, recreational vehicle parks and trailer parks];
4. Number of employed persons by full-time/part-time activity and NACE Rev. 2 activity [Total - all NACE activities];
5. Expenditure on tourism trips [duration: 1 night or over, Unit of measure: Thousand euro].

Due to the fact that the “Expenditure on tourism trips” indicator has a nominal value expressed in currency terms and that the analyzed EU27 countries have different populations, it was considered that it would be more appropriate to construct a relative indicator. Therefore, “Expenditure on tourism trips” was divided by “Population change - Demographic balance and crude rates at national level [Average population – total]”. As a result, a relative indicator called “Expenditure on tourism trips per capita” was created and used in the further procedure of composing matrix indicators.

Additionally, two synthetic indicators describing the tourism competitiveness of the analyzed countries in The Travel & Tourism Competitiveness Index were also taken into account:

1. WEF - The Travel & Tourism Competitiveness Index rank;
2. WEF - The Travel & Tourism Competitiveness Index total score.

The Travel & Tourism Competitiveness Index, published biennially by the World Economic Forum, is based on the analysis of a set of factors and policies that enable the sustainable development of this sector. Since 2015, the analysis covers 4 subindexes, 14 pillars and 90 indicators (before that period the indicators were organized in 3 subindexes). The first subindex, called „Enabling Environment”, refers to the general conditions of operating in a given country and includes 5 pillars (business environment; safety and security; health and hygiene; human resources and labor market; ICT readiness), described by 40 indicators. The second dimension, defined as „Travel and Tourism Policy and Enabling Conditions” addresses issues related to policies and strategies, creating 4 pillars (prioritization of travel & tourism; international openness; price competitiveness; environmental sustainability) assessed using 23 indicators. The third subindex – „Infrastructure” – evaluates 3 pillars (air transport infrastructure; ground and port infrastructure; tourist service infrastructure) with 17 indicators. The last study area, called „Natural and Cultural Resources”, consists of 2 pillars (natural resources; cultural resources and business travel) and 10 indicators. The analysis is based on statistical data obtained from international organizations and on information collected via the World Economic Forum’s Executive Opinion Survey, carried out among over 16,000 business executives and leaders (WEF 2019). Enriching the analysis with these two synthetic parameters was based on the assumption that, from the point of view of the study, in multivariate comparative analysis the synthetic parameter carries a larger amount of relevant data, which has a beneficial effect on the results obtained.

In the case of some of the above indicators, the gaps that appeared concerned mainly the year 2011 and were completed on the basis of linear extrapolation. The completed data matrices for the analyzed 5 years (the biennial analysis period was chosen due to the frequency of The Travel & Tourism Competitiveness Index publication, which allowed for comparability of data) finally contained 945 sub-indices.

The development pattern method used in this research is part of the group of methods that allow to rank observations in terms of the level of a complex phenomenon, from “the best” to “the worst” according to the adopted general criteria. Depending on the complexity of the problem, the pattern of proceeding in this analysis may vary (Balicki 2009, 318-323). The study was based on the following procedure:

1. Creating a matrix of EU countries and Indicators (observation matrix, data matrix)

$$\begin{array}{cccc}
 & I_1 & I_2 & \dots & I_m \\
 E_1 & x_{11} & x_{12} & \dots & x_{1m} \\
 E_2 & x_{21} & x_{22} & \dots & x_{2m} \\
 \vdots & \vdots & \vdots & & \vdots \\
 E_n & x_{n1} & x_{n2} & \dots & x_{nm}
 \end{array}
 \quad 2.1$$

where:

$E_{1...n}$ - EU Country

$I_{1...n}$ - Indicator

x_{nm} - the value of m-th features (I - Indicator) of the n-th object (E – Enterprise)

2. Determination of the nature of the diagnostic characteristics.

Diagnostic variables can be divided into: (1) Stimulants - such variables whose high values are beneficial from the point of view of the essence of the analyzed phenomenon, while low values are undesirable; (2) Destimulants - such variables whose low values are desirable, while high values are undesirable; (3) Nominants - such variables (features, measures), the desirable level of which is usually within a certain numerical range or refers to a certain fixed value (upward or downward deviations from the value or range are assessed as undesirable).

3. Normalization (standardization) of variables

The variables of the phenomenon under study, once their numerical values have been determined, must be standardized in terms of their units of measurement and of similar orders of magnitude. The standardization of variables is usually carried out on the basis of standardization according to the formula:

$$z_{ij} = \frac{x_{ij} - \bar{x}_j}{s_j} \quad (i=1, 2, \dots, n; j=1, 2, \dots, m) \quad 2.2$$

where:

z_{ij} - standardized value of variable x_{ij} for the i-th object,

$\bar{x}_j$ - arithmetic mean of the variable x_j ,

s_j - standard deviation of the variable x_j .

As a result, there will be a matrix:

$$\begin{array}{cccc}
 & I_1 & I_2 & \dots & I_m \\
 E_1 & z_{11} & z_{12} & \dots & z_{1m} \\
 E_2 & z_{21} & z_{22} & \dots & z_{2m} \\
 \vdots & \vdots & \vdots & & \vdots \\
 E_n & z_{n1} & z_{n2} & \dots & z_{nm}
 \end{array}
 \quad 2.3$$

4. Determination of the so-called positive pattern Z_0 with the "best" values of the variables

$$Z_0 = [Z_{01}, Z_{02}, \dots, Z_{0m}] \quad 2.4$$

where:

$$Z_{0j} = \begin{cases} \max \{z_{ij}\}, & \text{when variable } z_j \text{ is a stimulant} \\ \min \{z_{ij}\}, & \text{when variable } z_j \text{ is a destimulant} \end{cases}$$

And the so-called negative pattern (anti-pattern) Z_{-0} with the "worst" values of the variables

$$Z_{-0} = [Z_{-01}, Z_{-02}, \dots, Z_{-0m}] \quad 2.5$$

where:

$$Z_{-0j} = \begin{cases} \min z_{ij}, & \text{when variable } z_j \text{ is a stimulant} \\ \max z_{ij}, & \text{when variable } z_j \text{ is a destimulant} \end{cases}$$

5. Determining the similarity of the real objects and this pattern by determining the Euclidean distance (usually) between each observation and the pattern

$$d_{i0} = \sqrt{\sum_{j=1}^m (z_{ij} - Z_{0j})^2} \quad i = 1, 2, \dots, n \quad 2.6$$

where:

d_{i0} - Euclidean distance of the i -th observation of the development pattern

The more similar to the pattern (less distant from it) an observation is, the higher is the level of complex phenomenon for this observation.

Distances determined in this way should be referred to the maximum possible distance, which is the distance between the pattern and the anti-pattern

$$d_0 = \sqrt{\sum_{j=1}^m (z_{0j} - z_{-0j})^2} \quad 2.7$$

where: d_0 - distance between the development pattern and the anti-pattern

6. Determination of the Synthetic Measure of Development for each object, according to the formula:

$$SMD_i = 1 - \frac{d_{i0}}{d_0} \quad i=1, 2, \dots, n \quad 2.8$$

where:

SMD_i – Synthetic Measure of Development for i -th object

The values of such a measure are contained in the range [0, 1]. The higher the level of the phenomenon, the higher the value of the measure.

As a result, the Synthetic Measure of Development - SMD (Equation 8) ratio with a range from 0 to 1 for each of the 27 objects (EU countries) was created. Sorted from the highest to the lowest value of the SMD ratio, it became a ranking of the competitive position of EU countries from the tourism perspective. Additionally, diversification of the groups of the competitive position of EU27 countries in the tourism sector in the 2011-2019 period has been made based on their SMD value. Four groups of countries were identified: High SMD, Moderate SMD, Low SMD, Very low SMD.

3. Findings

By applying the Euclidean distance from the Positive Development Pattern (PDP), countries which, from the tourism sector perspective, have the highest level of competitive position, have been identified.

Table 1. Synthetic Measure of Development - SMD in the tourism sector for EU27 in the 2011-2019 period

Country	SMD 2011	SMD 2013	SMD 2015	SMD 2017	SMD 2019
Germany	0,649	0,658	0,645	0,558	0,592
France	0,548	0,562	0,550	0,493	0,501
Spain	0,461	0,476	0,479	0,441	0,449
Italy	0,439	0,446	0,459	0,430	0,445
Sweden	0,231	0,246	0,219	0,283	0,241
Netherlands	0,256	0,275	0,256	0,235	0,235
Austria	0,259	0,272	0,250	0,229	0,220
Poland	0,184	0,230	0,200	0,194	0,200
Denmark	0,219	0,233	0,204	0,196	0,194
Croatia	0,116	0,211	0,202	0,190	0,191
Finland	0,237	0,253	0,221	0,200	0,189
Portugal	0,155	0,175	0,164	0,157	0,160
Luxembourg	0,187	0,190	0,160	0,171	0,155
Ireland	0,189	0,209	0,183	0,166	0,151
Belgium	0,171	0,204	0,178	0,158	0,149
Greece	0,172	0,183	0,167	0,159	0,144
Czechia	0,172	0,196	0,154	0,145	0,134
Cyprus	0,156	0,171	0,129	0,094	0,096
Malta	0,135	0,157	0,103	0,107	0,096
Slovenia	0,108	0,123	0,102	0,090	0,087
Estonia	0,124	0,139	0,107	0,099	0,080
Hungary	0,110	0,129	0,110	0,091	0,078
Romania	0,058	0,059	0,061	0,055	0,069
Bulgaria	0,062	0,081	0,062	0,074	0,057
Slovakia	0,065	0,081	0,046	0,055	0,042
Latvia	0,055	0,086	0,055	0,050	0,029
Lithuania	0,048	0,086	0,044	0,046	0,024

Source: Own preparation based on the Eurostat database and The Travel & Tourism Competitiveness Index.

Considering the sub-indices adopted for the analysis, the leading places in the ranking in particular years are occupied by four EU countries: Germany, France, Spain, Italy. The last places in the ranking are occupied by Bulgaria, Slovakia, Latvia, Lithuania (see Table 1).

The evaluation of obtained values of the Synthetic Measure of Development - SMD allows us to notice that the competitive position of EU countries in the area of tourism practically does not change over the analyzed years. The only quite clear change can be observed in the case of Croatia (in 2011, its SMD value amounted to 0.116; while in subsequent years within 0.2). It should be assumed that this was related to Croatia's accession to the EU. It is evident that stability in SMD values can be observed over the period studied, with the exception of Croatia in 2011.

The study indicates that the application of the selected method of multidimensional comparative analysis allows for a quick synthetic assessment of the competitive position of EU27 countries from the tourism sector perspective (based on published sub-indicators, which individually do not carry as much content). On the one hand, the period adopted for the analysis (deliberately adopted before COVID-19) and, on the other hand, the use of a synthetic measure based on partial, generally spaced indicators will allow for a comparative assessment in the future (after COVID-19). The intention of the authors was to look for a measure that would allow an assessment of the situation in the tourism sector before and after COVID-19.

In addition, as a result of the study, it is possible to identify four groups of countries differentiated by the value of the SMD indicator - high SMD, moderate SMD, low SMD, very low SMD (see: Table 2).

Table 2. Diversification of the groups of the competitive position of EU27 countries in the tourism sector in the 2011-2019 period based on their SMD value

Type of SMD	High SMD	Moderate SMD	Low SMD	Very low SMD
SMD range	0,62-0,44	0,25-0,16	0,13-0,1	0,07-0,05
Group number	Group 1	Group 2	Group 3	Group 4
1.	Germany	Netherlands	Cyprus	Bulgaria
2.	France	Austria	Malta	Romania
3.	Spain	Sweden	Estonia	Slovakia
4.	Italy	Finland	Hungary	Latvia
5.		Denmark	Slovenia	Lithuania
6.		Poland		
7.		Croatia		
8.		Ireland		
9.		Luxembourg		
10.		Belgium		
11.		Greece		
12.		Portugal		
13.		Czechia		

Source: Own preparation based on the Eurostat database and The Travel & Tourism Competitiveness Index.

As a criterion for distinguishing countries, the largest identified step changes in the SMD (the so-called Group Cut-off Point) were adopted for the descending SMD values for the analyzed EU countries. This analytical approach is also confirmed by the graphical interpretation (see: Table 1). It was assumed that the border, which is the basis for separating a group of countries, is formed if the change in the SMD (for neighboring countries in the ranking) is not less than 25%. In this way, three borders dividing all analyzed countries into four groups were created. The purpose of this approach was not to divide the analyzed community into four groups equal in number, but to divide them into similar groups due to the size of the calculated SMD.

It can be seen that the groups obtained in this way are characterized by differentiation in terms of the number of countries in each group. The least numerous is group 1 - High SMD Countries, represented by four countries - Germany, France, Spain, and Italy. At the same time, in this group the diversity of entities in terms of the analyzed SMD is the highest. In this group, three countries (Germany, France, Spain) recorded a decrease in the value of SMD in the analyzed period, and one country recorded an increase (Italy).

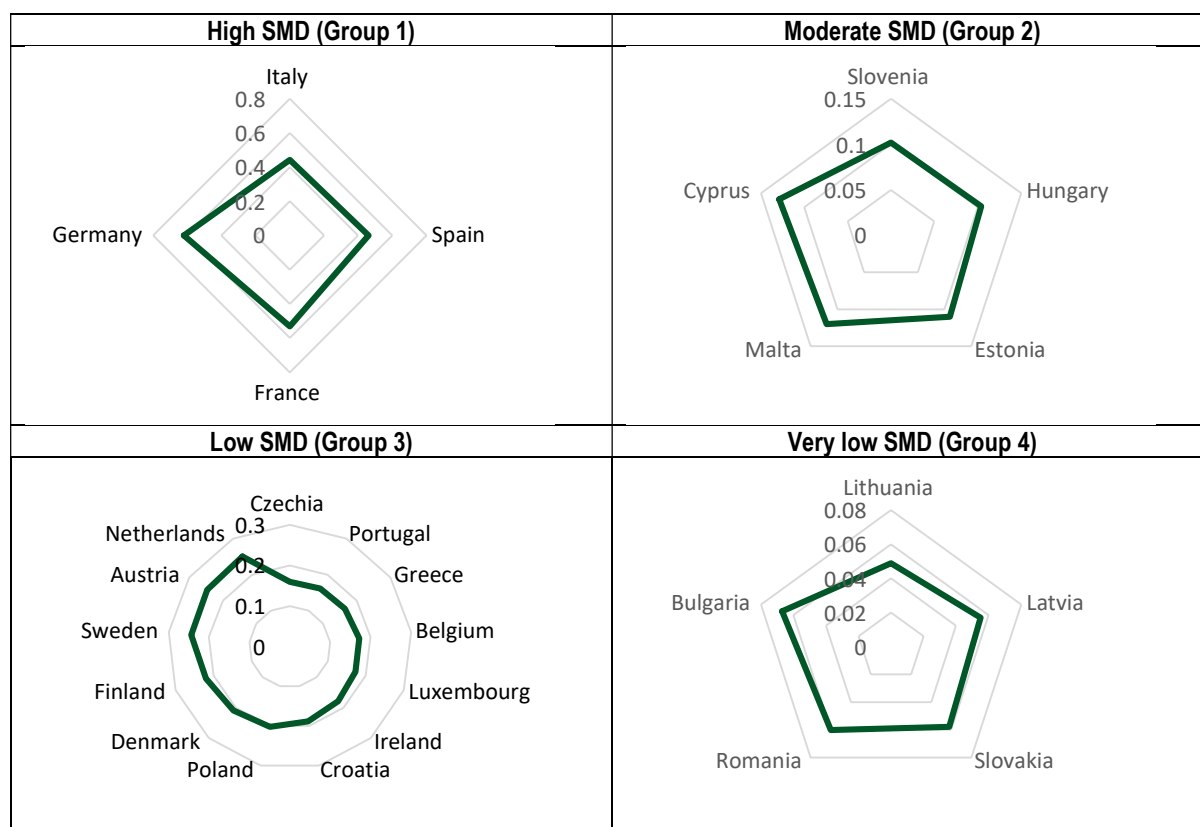
The most numerous group is group 2 - Moderate SMD Countries - which includes thirteen countries. In this group, as many as four countries (Sweden, Poland, Croatia, Portugal) recorded an increase in the SMD in the analyzed period in relation to the base year - it is in this group that we can find the country with the largest change in SMD in the analyzed period (Croatia), which practically allowed it to leave the lower group.

Both: group 3 (Low SMD Countries: Cyprus, Malta, Estonia, Hungary, Slovenia) and group 4 (very low SMD Countries: Bulgaria, Romania, Slovakia, Latvia, Lithuania) include five EU countries each. In the case of these two groups, we can distinguish only one country that changed its SMD in the analyzed period (Romania). The remaining countries decreased their SMD in the period under analysis - in the case of Cyprus, it was the largest decrease in the whole studied group.

Regarding the obtained groups of countries, it should be noted that, firstly, the criterion for distinguishing groups of countries is not only tourism attractiveness, but also the competitive position of the tourism sector of a given country compared to other analyzed EU countries measured by the synthetic measure - SMD.

Furthermore, considering the SMD values necessary to determine the group boundaries, it was possible to observe the leader countries in each of the identified groups (see: Figure 1).

Figure 1. Diversification of each group of the competitive position of EU27 countries in the tourism sector in the 2011-2019 period based on their SMD value



Source: Own preparation based on the Eurostat database and The Travel & Tourism Competitiveness Index.

In the first group of EU27 countries (High SMD), the uncontested leader is Germany. In the "Moderate SMD" group, among five EU27 countries, the leader is Cyprus. In the most numerous group of the studied EU27 countries, Netherlands occupied the highest position based on the SMD value. In the last group (Very low SMD), Bulgaria had the best competitive position compared to Romania, Slovakia, Latvia, and Lithuania (which came in last). In the third group, Czechia ranked last among thirteen countries. In the Moderate SMD group, Slovenia closed the ranking. In the first group (High SMD), Italy occupied the last place.

Conclusion

The SMD measure proposed in the article takes into account both tourism attractiveness measured by synthetic indicators (WEF rank, WEF score) and partial indicators relating directly to the competitive position of the tourism sector (infrastructure, inputs, etc.). Secondly, the division of countries into groups is conventional and is valuable in the context of analyzing possible post-COVID-19 changes (or lack thereof). This is because it is not known whether the post-COVID competitive position of individual countries in tourism will change or not. If we assume that COVID-19 will affect individual countries equally, their relative competitive position may change, but only slightly (the composition of countries will remain the same).

The method proposed in the article is suitable for competitive position assessment of various countries in the tourism sector, provided that the necessary data is available. This type of analysis is preliminary and provides a synthesis of the situation of a country's tourism sector. Drawing more detailed conclusions requires an in-depth study within the indicated factors defining the competitive position of a tourism sector.

As suggested in the literature, the procedure used to determine the SMD can be modified and extended to include other elements, e.g. to include weights for individual indicators, to use a different method of normalization, or to include a completely different configuration of sub-indices.

The study refers to the period before the COVID-19 pandemic. It is planned to continue the study covering the period after the outbreak of the pandemic. Continuation of the study will have two phases of the analysis: first - for the short term, covering 2020 and beyond, and the second one - for the longer term. The first analysis would be used to assess changes in the competitive position of EU countries as a direct result of the pandemic and the associated restrictions. The second analysis would answer the question of the sustainability of these changes, and could also contribute to assessing the resilience of the EU tourism sector to such incidents.

Limitations

It is important to note the limitations of the SMD interpretation. The SMD belongs to the group of linear ordering methods and, therefore, the SMD does not measure the intensity of the phenomenon under study, but only ranks it. The advantage of this type of research depends on the availability, completeness and timeliness of data for all countries surveyed, and there may be some difficulties in this respect (e.g. delays in the publication of data).

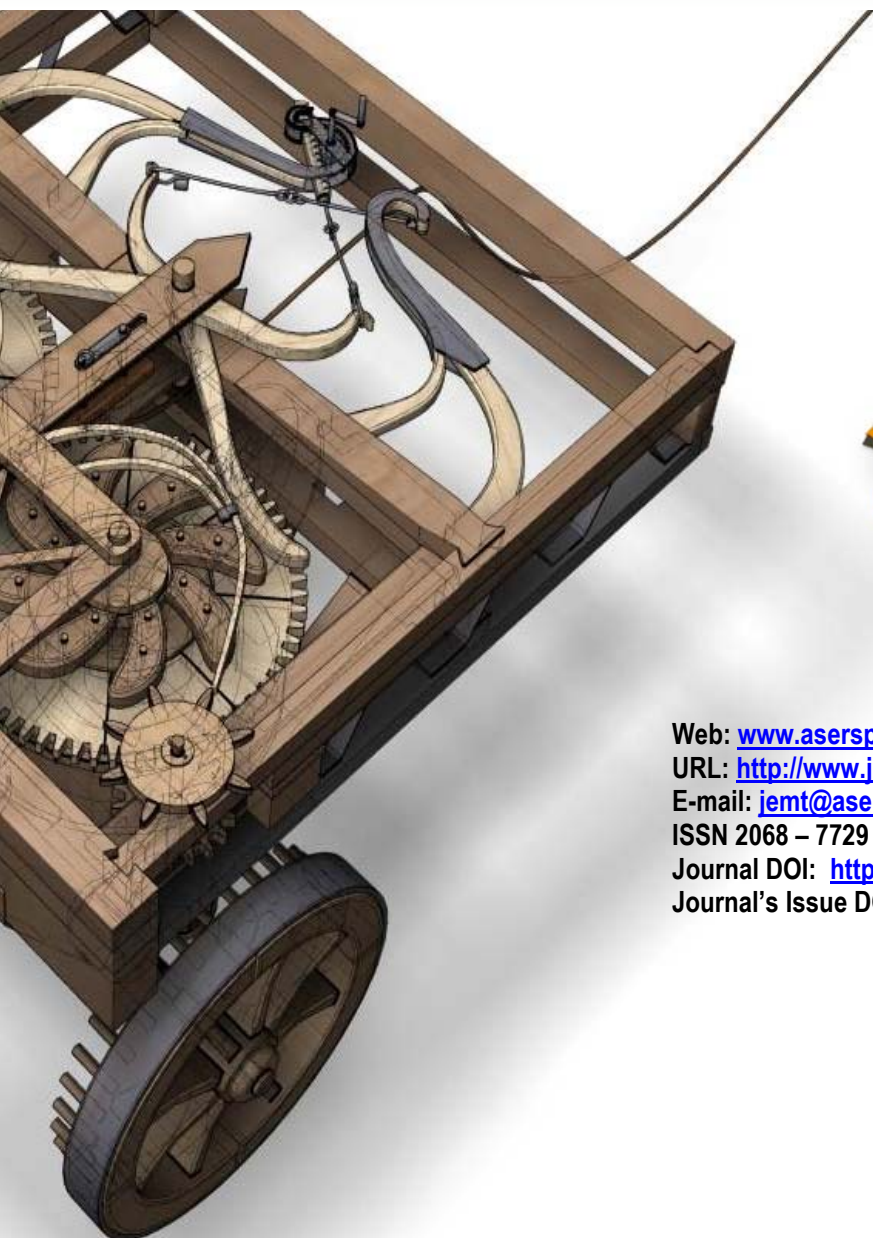
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