LITHUANIAN TOURISM COMPETITIVENESS IN THE CONTEXT OF BALTIC COUNTRIES

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ABSTRACT
The global tourism market witnesses the increasingly intensifying processes of altering competition and customer needs. Competition is taking place not only among tourism service providers, but also among other participants in the leisure services market – entertainment business organizations, trade and leisure centres.
Within the European tourism system the highest potential to increase the market share currently belongs to the Central and Eastern European states, which include Lithuania as well. Seeking to make use of these opportunities, it is indispensable not only to create tourism infrastructure, but also to search for other ways of representing unique tourism services. World Tourism Organization experts carried out a number of surveys, the goal of which was to determine the aims and presumptions of a touristic travel. It was established that even in the presence of changing leisure and holiday habits and fashions, one of the most important factors for choosing a target travel destination remains the touristic attractiveness of places of interest.
KEY WORDS: *global tourism market, tourism competitiveness, tourism development.*

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Introduction

According to the scientific literature, the touristic attractiveness of places of interest is frequently associated or even identified with the international image of the country. D. Bernstein (1996) explains the country's image in the international tourism market in terms of the peculiarities of a tourist's behaviour: the way a person behaves with respect to the country, the way he / she perceives the country – as a close or as a distant, closed or open, acceptable or unacceptable; how much a person trusts the information about the country and at what extent he / she is ready to travel to that country. D. Bernstein also found that tourists mainly associate the country's touristic attractiveness with the distance to the country, geographical location, climate, disposed natural or cultural resources, local culture and political situation.

It was also found that the touristic attractiveness and competitiveness assessment of places of interest is largely determined by the personal traits of a tourist and the nature of travel, but in particular by the compatibility of both of these elements. The following personal traits play a significant role in the assessment

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of touristic attractiveness of places of interest: age, education, financial situation, belonging to a particular social layer, profession and the position held. In turn, the assessment of the touristic attractiveness and competitiveness of places of interest is also influenced by the travel destination, travel duration, travel motivation, the preferred entertainments, the typology of tourist flows in the target travel destination, the travel type (individual or group), the size of the travelling group (Berardi, 2002).

The object of the research – Lithuanian tourism competitiveness.

The objective of the research – evaluate Lithuanian turism competitiveness in the context of Baltic countries.

The tasks of the research:

- to determine the tourism development trends in the international market and the changes in the global tourism market altering the competitiveness of a country
- to define the environmental factors strengthening the country's touristic attractiveness and competitiveness.
- to evaluate Lithuanian tourism competitiveness using three different methods, revealing different aspects of competitiveness: competitiveness of the conditions of tourism development, competitiveness of tourism export, tourism sector in economic performance.

The problem of the research is associated with the tourists' changing travelling habits and priorities, which leads to the alterations in the popularity of countries on the international tourism market. Methods of the research*:* the article is prepared by structuring and generalizing the content of studies carried out by different authors and scholars, and analyzing the tourism development forecasts. Based on the theoretical concept of a country's touristic attractiveness and competitiveness, the analysis of the factors enhancing the Lithuanian touristic competitiveness was carried out by applying the methods of systematic, logical and critical analysis, and relating theories with the trends of international tourism development policy.

1. Tourism Development Trends in the Global Market

When determining the priorities of international tourism development and modelling the future scenario, the analysis of the results of the global economic crisis was deliberately avoided. Firstly, because the economic recession affects all the sectors of the economy and determines the overall economic slowdown, including tourism. Obviously, tourism is particularly sensitive to economic fluctuations – travelling is among the first purchases which are refused during the period of economic recession; on the other hand, travelling has become an integral part of social life, therefore, tourists continue travelling once the economy starts recovering (Berger, 2004: 42). It should be noted that the economic slowdown does not reduce the desire to travel. However, on the assumption that travelling increases once the economy starts to recover, it must be acknowledged that the contemporary international tourism industry is facing other much bigger problems – the fear of international terrorism and global epidemics. It emerges that even a single terrorist act reduces the overall number of international travels, and the major terrorist attacks or global epidemics significantly influence the annual indicators of the global tourism business, frequently affecting the results of the next few years. If it was previously maintained that the international tourism business is very quick in responding to both the economic recession and the economic growth, it was observed that after the terrorist attacks or pandemics, tourism recovery is very slowly.

According to A. Vasiliev (2002: 32), after the terrorist attacks in the USA, which led to a reduction in the flows of tourists and travellers, some talks about the global tourism crisis could have been heard. However, despite these pessimistic predictions, the tourism business is becoming more and more important to the social and economic development of many countries. It is this branch of business which is developing most rapidly, penetrating the outermost regions of the world, even the ones which are rich in natural resources needed for the development of industry. The fact that the tourism business exists in general and is expanding is the indicator of human well-being and the growth of cultural level.

According to V. Zinkevičiūtė (2010: 27), under the current conditions, the changes in the tourism business environment are significantly influenced by the concept of sustainable development, which is based on the compromise between the environmental, economic and socio-cultural goals of society. The tourism business must not only respond to these changes, but also has to ground its activity on the concept of sustainable development, thus contributing to the tendentious development of these changes in the global context.

It also has to be admitted that these factors are beyond the control of modern society; thus the only way out is a rapid and efficient response – mostly by the involvement of governmental organisations. Therefore, it can be assumed that the global economic crisis has had less of an influence on the development of the international tourism business, and in particular on the determination of future trends, in comparison to the newly emerging H1N1 pandemic virus in Mexico and the USA. It resulted in a huge impact on tourism, because it originated in North America, the region, where the scope of tourism slowdown was the most obvious over the last few years. For many years the United States of America was leading in the world's tourism business, and the number of outgoing tourists was the highest in the world; recently, however, the relatively still good performance was backed up only by short-term trips – mainly to the Central America. It goes without saying that due to the H1N1 epidemic the total number of travellers in the world declined: it was not simply confined to North or Central America (Malinauskaitė, 2009: 64), but also to other faraway countries. However, this only secures the positions of the regions less affected by the virus – Asia and Europe, especially Asia, where the number of travellers is steadily increasing. It is safe to say that the host regions are bound to adjust to a maximum to the needs of the incoming tourists so as to maintain at least a minimum number of tourists, sometimes even sacrificing their national identity.

Returning back to the assessment of the outcomes of the global economic crisis and future trends, it can be assumed that China's tourism business should suffer the least in comparison to Europe or America – both in the Old Continent and the USA the middle-income earners were the main travellers. Thus, in the context of the economic recession, the middle-class in particular refuses to engage in unnecessary expenses, including travelling. On the other hand, statistics shows that in China 4 percent of the richest population are travelling. Moreover, considering the newest forecasts of the global GDP growth, we can be optimistic about China's economic development trends.

Europe still remains a big tourist region with a wide differentiation of tourism objects and products. In Europe, an average tourism sector input to GDP is 5 percent. It is forecasted that in 2011 this number will increase up to 6.7 percent (World Tourism Organisation's Vision for 2020, 2010). It is also predicted that in the same year the input to the GDP will considerably increase in India (up to 8.8 percent), also in China (approximately 2 times) (World Tourism Organisation's Vision for 2020, 2010: 21).

However, despite the initial attractiveness of future opportunities, we need to admit that radical social changes in the Asian societies and their impact on the European tourism market have not yet been scientifically researched. Though the significance of the growing number of Asian travellers, newly opening niches and emerging social groups to the future tourism business is recognised as the success guarantee for the future business, there is not much information about the needs of these tourists, their satisfaction and inevitable cultural integration. There is a lack of coherent and systematic approaches to the impact of tourism on cultural levelling; a newly occurring group of tourists from Asia, a culturally very different region, determine the need for scientific research and a respective regional state policy-making (Malinauskaitė, 2009: 66). The social tourism functions have been deliberately remembered – as already mentioned, tourism may become the victim of its own success, if it does not develop sustainably. Economic, social and ecological sustainability are the key factors of competitiveness in the territory, welfare of their local people and job creation, preservation and enhancement of natural and cultural sites.

According to the data of the World Tourism Organization (WTO) (2011), the international tourism strongly recovered in 2010. The number of arriving foreign tourists in 2009 dropped from 7 percent to 4 percent – this was namely the result of the global economic crisis. Positive indicators of the new places of interest visited by tourists still do not compensate for the damage caused by the crisis (Tourism Highlights 2010, 2010: 8). The recovery in this sphere, as expected, is more obvious in the economically developing countries.

Influenced by the improved economic conditions around the world, the international tourism has recovered faster than expected. By the end of 2009, all the regions of the world faced the increase in the number of incoming foreign tourists by up to 6.7 percent (Tourism Highlights 2010, 2010). At the peak of the crisis in 2008, the number of incoming tourists amounted to 913 million, in 2009 this number dropped to 877 million, and in 2010 it has already reached 935 million. This is 22 million more, in comparison to the year 2008 (Tourism Highlights 2010, 2010: 12). Based on the changes in the global tourism market and the forecast and vision of the World Tourism Organization, by the year 2020 (World Tourism Organization, 2009: 14), the share of the European tourism market should shrink by 10 percent (from 58 percent to 47 percent); therefore, the European states should seek for new measures to enhance attractiveness in order to avoid stagnation in the tourism sector.

The main structural trends of forecasts cannot change significantly. Experience shows that over a short period of time the faster economic growth periods (1995, 1996, 2000) slowed down the economic growth in 2001−2003. Though the growth rate by the year 2000 actually exceeded the vision of forecast of the World Tourism Organization for the year 2020, it is expected that current medium and long-term economic slowdown will meet these forecasts.

Predictably, in 2020, the three most visited regions will include: Europe (717 million tourists), Southeast Asia and the Pacific Ocean (397 million) and North and South America, followed by other regions, such as Africa, the Near East and South Asia. The East Asia and Pacific Ocean, Near East and Africa predict a rapid growth rate, which will amount to around 5 percent compared to the world average of 4.1 percent. Supposedly, in Europe and America, the growth rate will be slower in 2020 (World Tourism Organisation's Vision for 2020, 2010: 34).

In many Eastern European regions, when creating the strategies for social and economic development related to the regional or Euro-regional development, tourism is given a special emphasis. Tourism and related activities are perceived as the panacea when performing regional development actions, which are important for enhancing the impact of tourism on social, economic and cultural cohesion. The tourism industry's impact on regional development justified the expectations of many states, and in the future the tourism sector will remain one of the most rapidly growing economic sectors in the global word economy (Spiriajevas, 2004: 35).

2. Changes in the Global Tourism Market Altering the Attractiveness of Countries

Having analysed the data provided by the World Tourism Organization and the international tourism conferences in 2004 and 2005 (Conference in Prague in 2004 "Travel Fashions", rapporteur L. Cabrini), publications issued by the WTO and the European Travel Commission (Tourism Highlights, 2006; Tourism Trends for Europe 2006: 31), we can generalise the factors influencing the tourism growth rate in the world and the changes in the global tourism market:

- Raising living standards and economic growth of countries.

Travelling is no longer a luxury for many people; therefore, "last minute" travels are becoming more popular. The popularity of the mass tourism industry is declining; a stronger focus is placed on the ratio of quality and price, and at the same time, everyone is looking for a travel destination that meets their hobbies and needs. The supply of luxury tourist routes is developing as well as the demand for special tourism niches. It should be noted that the increasing income of young people determined the fact that the youth constitute 20 percent of the tourist flow scope.

- Raising fuel prices;
- Manifestations of terrorism;
- Safety during the travel;
- Increasing environmental concerns

The eco-tourism and rural tourism are gaining increasing popularity.

- Globalisation, which makes it possible to change the place of residence in another state.

Globalisation also influences the "temporary migration" – first and foremost, foreign students are distinguishable, whose number has reached 600.000, and this number is annually increasing by around 5 percent. People who have friends or relatives abroad travel to visit them and this is especially true for the new European Union states.

- Development of new technologies and the increasing number of Internet users.

This factor leads to an increase in the competitiveness of tourism enterprises and changes the selection criteria for tourist routes. People refer to a travel agency having already acquired a lot of information about the destination, prices, feedback, and therefore pose higher requirements for the travel agent.

Individual travel is becoming more popular (in comparison to travel offered by travel agencies), a person finds and orders online accommodation services, travel tours, transportation. Tourists use the internet not only when preparing for travel and ordering services, but also after having already reached the destination. Nevertheless, the WTO (which WTO?) research shows that tourism enterprises allocate only 3 percent of the total advertising budget to the online marketing measures.

- Change in the amount of free time and perception.

This is one of the reasons why the popularity of various electronic services, including tourism booking and payment online has enhanced, and this tendency will only increase in the future. In Europe there is a tendency that people travel more frequently but for shorter periods, therefore, visits various festivals, exhibitions and weekend travels to European cities are becoming more popular.

- Supply of low-cost flights.

Considering the fact that competition in the global tourism market is getting more intense, and the supply of tourism products is increasingly becoming similar, many countries that are giving priority to the development of tourism are seeking to strengthen their tourist attractiveness through the establishment of identity and image in the global tourism market through event marketing measures.

During an event a potential tourist receives a sent message about the identity of the place of interest – the values which are focused on. The perceived identity is an image, representing the client's attitude to the product. The identity is understood as the represented values, attitudes, and ideas. The identity and image is distinguished by the source of origin – the identity is created by the consciousness of the sender (enterprise), while the image is formed by the consciousness of the recipient (consumer) (Keller, 1999: 78). The image expresses the perception of separate groups about the product or brand, i.e. the way the aforementioned groups "decode" the signals which are sent by a business organisation via the communication channels. The purpose of identity is to define the value, aim and image of the brand within the enterprise.

The consumer perception differs depending on the conditions of the location and time as well as other factors. According to Behrer and Larsson (1998: 122), the main image-building factors include: communication; physical environment; products and services; ethics; social responsibility; relationship with the local community; behaviour of the representatives of the organisation.

A proper positioning of the place of interest on the global tourism market is associated with the ability to distinguish between the brands and strengthens the position in the market and on the consumer's consciousness for a particular product. The essence of it is to promote the awareness of the brand, which in the ideal case, would form a long-term consumer loyalty to the tourism products of a specific locality (Farquhar, 1990: 87).

In order to seek for a more competitive position on the global tourism market, Hoyle (2002: 96) recommends applying three methods of differentiation of tourist attractiveness factors:

- General perspective: a higher value for the same price, reliable products for an affordable price;
- Product perspective: a better/newer/cheaper/unique product;
- Consumer perspective: a better awareness of the costumer, a faster and more flexible response to their needs.

The third method of differentiation is associated with the co-operation relations between the consumer and the organisation. According to Öqvist (1999: 76), the product differentiation strategy should include more cultural elements which need to be included in the events.

Over a certain period of time the relationship between the consumer and the product may evolve to the loyalty to a brand. The loyalty is characterised by a positive attitude towards the brand through repetitive purchases. Each place of interest seeks maximum customer loyalty, because this ensures stability and an opportunity to occupy a bigger market share and earn more profit. In order to assess if positioning was done correctly, the method of direct sales results is most commonly used.

3. Evaluation of Lithuanian tourism sector competitiveness in the Baltic countries region

Competitiveness of Lithuanian tourism sector in the context of the Baltic countries was analyzed using three different methods, revealing different aspects of competitiveness: competitiveness of the conditions of tourism development, competitiveness of tourism export, tourism sector in economic performance.

To determine how competitive on the international tourism market is a tourism sector of each of the Baltic countries, was calculated RCA index (called Revealed Comparative Advantage). RCA shows a certain product (or in this case, services) for the country's exports relative to its value in other countries. For determination of Baltic tourism export competitiveness were used two modified RCA indices:

Gross RCA (A, G) index, that shows the importance of tourism services exports in the Baltic countries exporting goods and services, is given by (Jackman, 2011: 4):

$$RCA\ (A, G) = (xiA/XA) / (xiw/Xw), \qquad (1)$$

xiA – amount of a country's A product's i export;
XA – amount of a country's A export;
xiw – amount of product's i export in the world;
Xw – amount of export in the world.

RCA (A, S) service index, that shows the importance of tourism services exports in the Baltic countries for export volume is given by:

$$RCA\ (A, S) = (xiA/XPA) / (xiw/XPw) \qquad (2)$$

Lithuanian tourism sector becomes a higher competiveness evaluation just in pillars "Health and hygiene" and "ICT infrastructure". Most of the pillars with low competitiveness evaluation are related to general business environment and must be changed on a level of government's policy: conditions for business, lack of investment in the sector, not enough adapted tourism attractions for tourists. Lithuania also has some infrastructure problems: compared to the other Baltic countries, Lithuania is distinguished by poorer air transport and tourism infrastructure.

According M. Jackman's RCA methodic, countries have been classified in to for groups by the RCA index.

Table 1. Classification of countries according RCA index

Group A	Group B	Group C	Group D
$0<RCA\leq1$	$1<RCA\leq2$	$2<RCA\leq4$	$RCA>4$
Countries without comparative advantage	Countries with slight comparative advantage	Countries with average comparative advantage	Countries with strong comparative advantage

Source: Jackman et all, 2011, p. 4

As seen in the table 2, Lithuania had no comparative advantage in the Baltic countries context over a period 2003−2012. Estonia had a weak comparative advantage against Lithuania and Latvia entire analyzed period over the period a relative level of superiority changed only in Latvia. Since 2008 it went from A to B class: the country without a comparative advantage became a country with a weak comparative advantage compared to the other Baltic countries.

Table 2. Classification of Baltic countries by RCA (b) index over a period 2003−2012

	2003	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2011**	**2012**
Estonia	b	b	b	b	b	b	b	b	b
Latvia	a	a	a	a	a	a	b	b	b
Lithuania	a	a	a	a	a	a	a	a	a

Since the lower gross RCA indicator values can be determined by the country's export structure (a country is focused on industrial products rather than services exports), is useful to assess the importance of tourism services exports. RCAP values given in table 3.

Table 3. RCA (p) index values over the period 2003−2012

	2003	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2011**	**2012**	**Change rate (in percent)**
Estonia	1.34	1.23	1.23	1.26	1.23	1.1	1.15	1.1	1.13	-15.9
Latvia	0.42	0.55	0.6	0.66	0.78	0.85	0.9	0.94	0.94	123.96
Lithuania	1.09	1.09	1.01	0.98	0.93	1.01	0.96	0.95	0.91	-15.84

Analysis of revealed comparative advantage indices revealed that none of the Baltic states has no significant comparative advantage against each other, but Estonia and Latvia (from 2009) have a weak comparative advantage. Meanwhile, Lithuania is a country without a comparative advantage. The analysis of the value of tourism services exports of Lithuanian goods and services exports shows that Lithuania did not become the relative advantage in the relation to other Baltic countries. Meanwhile, service exports noticed that over a period 2003−2005. Lithuania had a weak comparative advantage, which was subsequently lost to Latvia's growth performance. It is also found that the tourism value of Lithuanian exports gradually declined over the period.

The tourism sector has become one of the most important sectors in the European Union economy. In the process of a steady growth of tourism demand, tourism companies generated additional jobs, higher turnover and the added value (European Commission, 2009: 2). Economic indicators reflect the competitiveness of individual countries, because it shows how different countries are able to create economic prosperity taking advantage of the available resources. In this article analysis and evaluation of Lithuanian tourism indicators are conducted in the context of the Baltic countries. This paper provides an analysis of the main economic indicators in tourism development: direct and total contribution to the GDP and the total direct contribution to employment.

Tourism indicators in the Baltic countries are compared not only with each other but also with the average global indicators and indicators of the EU. Information about a direct contribution of the tourism sector to GDP in the period of 2002−2012 is presented in the table 4.

Table 4. Direct contribution of the tourism sector to the GDP in the Baltic States and in the world in the period of 2003−2012 (in percent)

	2003	**2012**	**Absolute change**	**Relative change**	**Average annual change**	**Average contribution to GDP**
Estonia	4.5	3.3	-1.2	-27.3	-3.1	3.66
Latvia	2	2.9	0.9	45	4.4	2.55
Lithuania	2.4	1.6	-0.8	-33.3	-3.6	2.11
Average in the world	3.1	2.8	-0.3	-9.7	-1.1	2.95

Direct contribution to GDP reflects the added value directly related to tourism enterprises (travel agencies, museums, accommodation providers, operators and so on.). As shown in the table above, in the period of 2003–2012, the average direct contribution of tourism to GDP in the world amounted to 2.95 percent. Latvia and Lithuania have lagged behind the global average, they have developed the tourism sector respectively 2.55 and 2.11 percent of GDP. Estonia is ahead neighboring countries and the world average quite significantly, with the tourism sector's contribution to GDP of 3.66 percent. The table also shows that the global tourism sector's contribution to GDP declined by 9.7 percent, in Lithuania and Estonia, respectively, by 33 and 27 percent. Meanwhile, share of GDP created by the tourism sector in Latvia has increased significantly (45 percent). Such substantial Latvian tourism growth can be traced to successful marketing projects of Latvian tourism.

Table 5. The tourism sector's contribution to the total GDP in the Baltic States and in the world in the period of 2003–2012 (in percent)

	2003	**2012**	**Absolute change**	**Relative change**	**Average annual change**	**Average contribution to GDP**
Estonia	16.9	12.5	-4.3	-25.4	-2.9	14.71
Latvia	5.8	7.7	1.9	32.8	3.3	7.3
Lithuania	6.4	4.2	-2.2	-34.4	-3.5	5.79
Average in the world	9.6	9.1	-0.5	-5.2	-0.6	9.44

Tourism sector's contribution to employment is understood as relation between employees in a tourism sector and the total employment in the country. Contribution of the tourism sector by creating jobs, as well as the contribution to GDP, can be direct and indirect. In the first case only employment in the enterprises of the tourism sector is considered; otherwise consider the overall impact of tourism on economic growth and the impact on jobs not directly related to tourism industries (e.g., regional tourism development increased employment in catering or transport). Information about the direct contribution of the tourism sector to employment in the Baltic countries and worldwide is presented in table 6.

Table 6. The direct contribution of the tourism sector to employment in the Baltic States and all over the world in the period of 2002–2011 (in percent)

	2002	**2011**	**Absolute change**	**Relative change**	**Average annual grow**	**Average contribution to employment**
Estonia	4.3	3.3	-1	-23.3	-2.5	3.7
Latvia	1.9	2.7	0.8	42.1	4.2	2.43
Lithuania	2.3	1.6	-0.7	-30.4	-3.3	2.05
Average in the world	3.4	3.3	-0.1	-2.9	-0.3	3.43

As seen in the table 6, the highest contribution to employment was in Estonia, almost all the analyzed period the country exceeded the world average. The smallest relative number of jobs in the tourism sector operators in 2002–2011 m. was created by Lithuania (only 2.05 percent.).

Latvia had the average employment in the tourism sector by 2.43 percent of the population. The data also reveal that over the analyzed period, the tourism sector's contribution to employment in Latvia grew by 42.1 percent while in other countries this share was significantly decreased by 30.4 percent in Lithuania and by 23.3 percent in Estonia.

Comparing direct and indirect tourism sector's contribution to employment, it can be seen that according to the second indicator the analyzed sector employment creates a significant share of total employment, but the general trend of the Baltic countries remains the same (table 7).

Table 7. The tourism sector's contribution to the total employment in the Baltic States and worldwide in the period of 2002−2012 (in percent)

	2002	**2011**	**Absolute change**	**Relative change**	**Average annual grow**	**Average contribution to employment**
Estonia	16.1	12.3	-3.8	-23.6	-2.7	14.23
Latvia	5.3	7.2	1.9	35.8	3.6	6.83
Lithuania	6	4	-2	-33.3	-3.4	5.48
Average in the world	9.2	8.6	-0.6	-6.5	-0.7	9.2

The total employment indicators in the tourism sector in Estonia more than doubled ahead of neighboring countries, in the period of 2002–2011 the average of the tourism sector's contribution to employment was 14.23 percent, while in Lithuania it was only 5.48 percent, in Latvia a little more – 6.83 percent. Lithuania is not only in the last position according to this indicator, but over the period of its rating fell the most (-33.3 percent over the period), about 3.4 percent annually. Meanwhile, in Latvia the contribution of tourism to employment over the period surpassed Lithuania, and the average annual growth was 3.6 percent.

A review of key economic indicators for the tourism sector analysis revealed that Lithuania, as compared with the other Baltic countries, is less competitive – the country does not use the existing tourism potential in the tourism sector and do not provide opportunities to create economic value. Both direct and overall contribution to the gross domestic product and employment, Lithuania lags behind both the average level of the world and the other Baltic countries. A positive example of the analyzed period can be seen in Latvia, which within less than a decade was able to increase the contribution of tourism to the economy by more than 30 percent.

The competitiveness evaluation ensured that not only limited to certain characteristics of the sector, however, shows a sufficiently detailed picture of the sector results in different areas. As the analysis shows, Lithuanian tourism sector competitiveness, in the context of the Baltic countries, is low: the country fully uses the existing potential and thus does not promote the development of tourism and economic growth in the deposit. Summary of the Baltic tourism competitiveness estimates is presented in the table 8.

Table 8. The Baltic tourism competitiveness rating over the period of 2002–2011, using different methods

	Average TTCI indicator		**Average RCA (B) indicator**		**Average RCA (P) indicator**		**Average contribution to GDP**		**Average contribution to employment**	
	Estim.	Pos.	Estim.	Pos.	Estim.	Pos.	Estim.	Pos.	Estim.	Pos.
Estonia	4.863	1	1.48	1	1.2	1	14.71	1	14.23	1
Latvia	4.331	2	0.81	2	0.73	3	7.3	2	6.83	2
Lithuania	4.326	3	0.78	3	0.99	2	5.79	3	5.48	3

The data show that, among the evaluated Baltic countries Estonia is leading and Lithuania takes the third place. TTCI analysis revealed that the conditions for the development of tourism in Lithuania is lower than in the other Baltic countries. In 2011, TTCI index is ranked 55th position, while Latvia and Estonia, 51 and 25, respectively. In addition, over the period of 2007−2011 Lithuania's TTCI ranking fell by 4 positions, while Estonia and Latvia rose by 3 and 2 positions (World Travel and Tourism Council, 2012: 45). Thus, despite the state-level efforts to promote the development of tourism, the tourism sector conditions in Lithuania are not improving.

The Baltic tourism sector determinants revealed that Lithuania has the lowest position in accordance with its existing business conditions. The best conditions for the development of the tourism sector concluded in Estonia.

The analysis of the value of the export of tourism services in the Baltic countries total exports of goods and services, it is clear that the export of tourism services in Lithuania has the lowest value, the average value of RCAB in the period of 2002−2010 was 0.78 (no comparative advantage). According to the research results, Estonia has a slight comparative advantage over other Baltic states. Within the period in question its comparative advantage index for both general export and service export exceeds 1. When analysing RCAp index for the Baltic states it was established that Lithuania has a better RCAp index than Latvia (0.99), proving that Lithuania has almost reached the slight revealed comparative advantage index.

Performed in the Baltic countries in the tourism sector of economic indicators, the analysis showed that Lithuanian tourism sector's contribution to the economy is the lowest in the Baltic countries. Over the period of 2002–2012 tourism sector's contribution to the total GDP was 5.79 per cent., the total contribution to employment − 5.48 percent. Meanwhile in Latvia these figures amounted to 7.3 and 6.83 percent. According to the economic performance of the tourism sector Estonia was the leader: during the analyzed period, the tourism sector accounted for 14.71 per cent GDP and employed 14.23 percent of the total employment. So, in summary it could be said that Lithuania is lagging behind other Baltic countries in the tourism sector for many indicators.

Conclusions

Based on the changes of the global tourism market and forecasts and vision of the World Tourism Organisation for 2020 (World Tourism Organisation, 2006), the share of the European tourism market should shrink by nearly 10 percent (from 58 percent to 47 percent); therefore, the European states need to seek for new sources enhancing attractiveness and uniqueness as well as partake in image-building measures in order to avoid the stagnation in the tourism sector.

Summarizing the assessment criteria enumerated in the assessment models for the touristic attractiveness and competitiveness of places of interest, it is possible to state that the influence of the touristic attractiveness of places of interest on the qualitative evolution of a particular territory and tourism development therein primarily manifests itself by the realization of social functions, whereof the main ones are bringing material and non-material goods to the consumption level; servicing of the consumption process; creation of conditions for alternating activity types and for leisure; ensuring health security and formation of the general educative and cultural-technical level of the population.

Analysis of Lithuanian tourism competitiveness in the context of Baltic countries revealed that Lithuanian tourism sector is less competitive than the other Baltic countries: a part of Lithuanian tourism exports in total goods and services exports is not so large than in the other Baltic countries. Lithuanian tourism economic indicators – contribution to GDP and employment – as well as lower than the other Baltic countries. So, while Lithuania has a similar natural environment for tourism development as Latvia and Estonia, but its tourism sector is less-developed than in other analyzed countries.

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LIETUVOS TURIZMO KONKURENCINGUMAS BALTIJOS ŠALIŲ REGIONE

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Santrauka

Mokslinėje literatūroje lankytinų vietų turistinis patrauklumas dažnai siejamas ar net tapatinamas su tarptautiniu šalies įvaizdžiu. D. Bernstein (1996) šalies įvaizdį tarptautinėje turizmo rinkoje aiškina turisto elgsenos ypatumais: kaip asmuo elgiasi šalies atžvilgiu, kaip suvokia šalį – kaip artimą ar tolimą, uždarą ar atvirą, priimtiną ar nepriimtiną; kiek pasitiki apie šalį teikiama informacija ir ar yra pasiruošęs keliauti į tą šalį. D. Bernstein taip pat ištyrė, kad turistai šalies patrauklumą paprastai sieja su atstumu iki jos, geografine padėtimi, klimatu, disponuojamais gamtos ar kultūros ištekliais, vietine kultūra ir politine situacija.

Taip pat nustatyta, kad lankytinos vietos turistinio patrauklumo ir konkurencingumo vertinimą nemažai lemia asmeniniai turisto bruožai ir kelionės pobūdis, tiksliau, šių dviejų elementų suderinamumas. Lankytinos vietos turistinio patrauklumo ir konkurencingumo vertinimui reikšmingesnės yra šios asmeninės savybės: amžius, išsilavinimas, materialinė padėtis, priklausomumas tam tikram socialiniam sluoksniui, profesija ir einamos pareigos. Savo ruožtu lankytinos vietos turistinio patrauklumo ir konkurencingumo vertinimui įtakos turi kelionei pasirinkta vieta, kelionės trukmė, motyvacija, pageidaujamos pramogos, turistų srautų tipologija lankomoje vietovėje, kelionės tipas (individuali ar grupinė), kartu keliaujančių asmenų grupės dydis (Berardi, 2002).

Tyrimo objektas – Lietuvos turizmo konkurencingumas.

Tyrimo tikslas – įvertinti Lietuvos turizmo konkurencingumą Baltijos šalių regione.

Tyrimo uždaviniai:

- nustatyti turizmo plėtros tendencijas tarptautinėje rinkoje;
- nustatyti šalių patrauklumą keičiančius globalios turizmo rinkos pokyčius;
- įvertinti Lietuvos turizmo konkurencingumą Baltijos šalių regione, taikant tris vertinimo metodus: turizmo plėtros sąlygų konkurencingumo vertinimą, turizmo eksporto konkurencingumo vertinimą ir turizmo sektoriaus ekonominio poveikio vertinimą.

Tyrimo problema sietina su besikeičiančiais turistų keliavimo įpročiais ir prioritetais, to padarinys – kintantis šalių populiarumas tarptautinėje turizmo rinkoje.

Tyrimo metodai: straipsnis parengtas sisteminant ir apibendrinant įvairių autorių ir mokslininkų darbų turinio, turizmo plėtros prognozių analizę. Remiantis teorine šalies turistinio patrauklumo samprata, atlikta šalies turistinį patrauklumą kuriančių veiksnių analizė, taikant sisteminės, loginės ir kritinės analizės metodus, siejant teorines nuostatas ir tarptautinės turizmo plėtros politikos tendencijas.

Nustatyta, kad, nors Lietuvos turizmo sektorius disponuoja panašiais gamtos ištekliais, kaip ir kitos Baltijos šalys, konkurencingumu jis nusileidžia kitoms Baltijos šalims: Lietuvos turizmo paslaugų eksporto konkurencingumas ir turizmo ekonominio poveikio rodikliai žemesni nei kaimyninėse šalyse. Remiantis turizmo eksporto ir ekonominio poveikio pastarųjų metų rodikliais, Lietuvą galima priskirti nekonkurencingų šalių grupei, tuo tarpu Estija ir Latvija priskirtinos žemo konkurencingumo lygio šalių grupei. Turizmo plėtros nulemtas indėlis į BVP ir darbo vietų kūrimą Estijoje beveik tris kartus didesnis nei Lietuvoje ir beveik du kartus didesnis nei Latvijoje.

PAGRINDINIAI ŽODŽIAI: *globali turizmo rinka, turizmo konkurencingumas, turizmo plėtra.*

JEL KLASIFIKACIJA: O100, O110, L890.