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Tourism Destination Competitiveness of Chile: A Stakeholder Perspective

Claudio Aqueveque^a and Constanza Bianchi^{b,c}

^aSchool of Business, Universidad Adolfo Ibáñez, Viña del Mar, Chile; ^bSchool of Business, Universidad Adolfo Ibáñez, Santiago, Chile; ^cQUT Business School, Queensland University of Technology, Brisbane, Australia

ABSTRACT

Chile is increasingly becoming an important tourist destination market in South America. However, there has been limited research that considers the perspective of stakeholders involved in developing competitiveness for a tourist destination from an emerging market. The purpose of this research is to explore the main features and requirements of destination competitiveness, as well as the main drivers and inhibitors of the competitiveness of Chile as a tourist destination from a stakeholder perspective. A qualitative case study research involved in-depth, semi-structured personal interviews with key stakeholders of the tourism industry in Chile (both private and public sectors). The research findings identify specific competitiveness factors and the scope of influence of each in the development of a tourist destination in an emerging South American market. The findings of this study are useful for national government tourism boards, public policy-makers, local tourism businesses, travel intermediaries and the host community.

KEYWORDS

Destination competitiveness; stakeholder; Chile; South America

1. Introduction

The travel and tourism industry accounts for a significant share of global employment and also provides an important opportunity in terms of growth and development for nations (WEF, 2015). In 2015, travel and tourism generated US\$7.2 trillion (9.8% of global GDP) and supported 284 million jobs, equivalent to 10% of jobs in the global economy, with a predicted rise of 3.3% in 2016 (WTTC, 2016). According to the Travel & Tourism Competitiveness Index, the top ranks of the index are invariably dominated by advanced economies; however, tourism growth over recent years has largely been driven by emerging economies (TTCI, 2015). Many destinations from emerging regions of the world are attempting to develop and exploit their tourism potential to attract and cater to visitors from both domestic and international markets.

Tourism is recognized as one of the key industries for development and a major source of income, jobs and wealth creation, particularly for less developed countries (Dupeyras & MacCallum, 2013; WEF, 2015). The tourism industry is also seen as being critical to achieving a strong role in promoting the image and international perception of a country

externally and influencing domestic policies. For example, Chile is one of the most visited destinations in South America, with an appeal as a tourist destination mostly based upon its landscape and natural environment (TTCI, 2015). According to the Travel & Tourism Competitiveness Report 2015, Chile performs well in terms of business environment, safety and security, price competitiveness and international openness. However, Chile's performance levels are low in terms of transportation, infrastructure, and cultural and natural resources, with an overall score of 51 behind Brazil and Mexico (TTCI, 2015).

According to the World Tourism Organization, tourism in many developing countries is the most viable and sustainable economic development option (UNWTO, 2015). Tourism acts as a stimulating factor for economic and national development and is a main source of foreign income for a large number of developing countries due to its multiple effects on other industries (Ayikoru, 2015; Brida & Risso, 2009; Dupeyras & MacCallum, 2013). Thus it is vital for tourist destinations from these markets to develop and strengthen a competitive position in an increasingly competitive global market, and therefore an analysis of the competitiveness of individual destinations around the world remains pertinent. Nevertheless, most research on tourist destination competitiveness considers the demand side and limited research has addressed destination competitiveness from a supply-side stakeholder's perspective (Zehrer & Hallmann, 2015).

The importance of destination competitiveness and its determinants has also been widely recognized in the literature (Botti, Peypoch, Robinot, & Solonandrasana, 2009; Crouch & Ritchie, 1999, 2005; Dwyer & Kim, 2003). Crouch and Ritchie (2005) argue that what makes a tourist destination truly competitive is its ability to attract visitors, while providing them with satisfying, memorable experiences, and to do so in a profitable way, while enhancing the well-being of destination residents and preserving the natural capital of the destination for future generations. Further, Dwyer and Kim (2003, p. 372) emphasize that the ultimate goal of a destination's competitiveness is "to maintain and increase the real income of its citizens, usually reflected in the standard of living of the country". This is especially important for less developed regions, such as South American countries (Brida & Risso, 2009).

According to some authors, destination competitiveness is associated with the economic prosperity of residents of a country (Buhalis, 2000; Crouch & Ritchie, 1999). However, this link is not always evident in practice. Although some destinations have been effective in attracting tourists and have been assessed as very competitive destinations, others fail to develop competitiveness or effectively transform it into economic benefits for their local populations (Webster & Ivanov, 2014). Consequently, destinations face the main challenge of transforming a fragmented supply offer into a coherent tourist product. In the development of destination competitiveness, destination management plays an important role (Crouch & Ritchie, 1999; Dwyer & Kim, 2003), and several authors have suggested that major stakeholders of the supply side, such as national tourism boards and local tourism operators, are the essential elements for the sustainable development and competitiveness of tourist destinations (Dredge, 2006; Ritchie & Crouch, 2003). However, tourist destinations have a variety of independent stakeholders, which makes coordination towards a shared goal a difficult task (Laws, Richins, Agrusa, & Scott, 2011). Additionally, one main key to the success and implementation of strategies for tourist destinations is the coordination and support of stakeholders, such as NTOs, destination management organizations (DMOs), businesses, and transport and travel agencies

(Enright & Newton, 2004). Therefore, destination management is a complex task undertaken by both the public and private sectors, and considers activities that improve the competitiveness of the destination, such as development of DMOs, destination marketing management, and destination planning and development (Ritchie & Crouch, 2000).

Bornhorst, Ritchie, and Sheehan (2010) argue that the roles of destination management activities have been explored mostly from a demand perspective (Getz, Anderson, & Sheenan, 1998), whereas less attention has been devoted to destination competitiveness from the supply perspective. In particular, few scholars have explicitly investigated the role of destination management for destination competitiveness from a supply-side viewpoint. Within the tourism industry, the main stakeholders are the key actors that play an important role to convert a destination in a competitive destination since their activities are considered a fundamental dimension of competitiveness. Studies on destination competitiveness considering the perspective of the stakeholders have received scant attention in the literature (Enright & Newton, 2004), although several authors have emphasized the importance of suppliers and tourism products contributing to destination competitiveness (Buhalis, 2000).

In addition, limited research has considered destination competitiveness of countries in less developed regions (Bianchi, Pike, & Lings, 2014). The majority of research on destination competitiveness has been conducted in developed countries, such as the USA, Europe and Australia (e.g. Li & Xu, 2015), and less is known about destination competitiveness of emerging regions, such as South America (Koc, 2009). Emerging countries need to gain destination competitiveness as a source of growth for their economies. Towards this purpose, active policies require a good understanding of the determinants of tourism competitiveness to guide governments in their analysis and development of strategies and to inform tourism policy development. Addressing the major challenges faced by the tourism industry and maximizing tourism's full economic potential, requires an integrated research approach for emerging tourist markets.

Overall, the main purpose of this study is to investigate the perspective of the supply side regarding the tourism competitiveness of a destination located in South America. Specifically, the goal is to investigate stakeholders' perceptions of their own role in the development of competitiveness of Chile as a tourism destination. Understanding destination competitiveness is a major consideration for academics and policy-makers and a major challenge for professionals in providing evidence to inform decision-makers in tourism. In addition, investigating multiple tourism stakeholders' perspectives may identify differences in perceptions suggesting the need to manage different views (Byrd & Gustke, 2006). The findings contribute to the tourism literature and provide policy-makers with information on destination competitiveness to enable the formulation of better policy responses that contribute to strengthening the competitive position of Chile in the global tourism market.

2. Literature review

2.1 Destination competitiveness

Destination competitiveness is becoming an area of growing interest among marketing and tourism researchers and has important implications for practitioners and

policy-makers (Ritchie & Crouch, 2000). A destination is considered to be a unification of tourism products that offer an integrated experience to prospective tourists (Buhalis, 2000). Destination competitiveness is therefore the ability of the destination to attract and satisfy tourists (Enright & Newton, 2004; Tsai, Song, & Wong, 2009) and to deliver better products and services compared to other destinations (Dwyer & Kim, 2003).

Several studies have investigated the topic of destination competitiveness in the tourism literature (e.g. Ayikoru, 2015; Chon & Mayer, 1995; Cracolici & Nijkamp, 2009; Crouch, 2011; Crouch & Ritchie, 1999; Dwyer & Kim, 2003; Faulkner, Oppermann, & Fredline, 1999; Gomezelj & Mihalic, 2008; Goodrich, 1977; Koc, 2009; Kozak & Rimmington, 1999; Kozak, Baloglu, & Bahar, 2009; Lee & King, 2006; Pearce, 1997; Zehrer & Hallmann, 2015; Zehrer, Smeral, & Hallmann, 2016). According to these studies, the competitiveness of a tourist destination considers several factors, such as resources, destination management, demand and situational conditions. Tourists choose destinations by comparing these factors among various destinations (Kozak et al., 2009). The seminal works by Crouch and Ritchie (1999) and Ritchie and Crouch (2003) have provided a base for the development of further destination competitiveness models (Dwyer & Kim, 2003; Enright & Newton, 2004).

Increasingly, tourism destinations are trying to become more competitive attempting to convince their customers that they provide a unique tourism experience. However, destinations in nature are much more complex and different from most commercially competitive products because they deliver an “experience” to its visitors, which involve a complex array of different businesses and industry sectors of a nation. A tourism experience is a combination of tourism organizations (e.g. hotels, resorts, restaurants, airlines, tour operators), other supporting industries and organizations (such as arts, entertainment, sports and recreation, shopping), DMOs (private–public partnerships), the public sector (providing infrastructure, communication, transportation) and local residents within a destination. The multiplicity of stakeholders involved in providing the tourism experience to the visitor makes the management of the destination tourism experience more complex.

2.2. Destination management

Gomezelj and Mihalic (2008) state that a competitive advantage can only be created by improving the response to demand side challenges, which, according to them, calls for a significant role of destination management. According to Crouch and Ritchie (1999, p. 149), “destination management factors are those that can enhance the appeal of the core resources and attractors, strengthen the quality and effectiveness of the supporting factors and resources and best adapt to the constraints imposed by situational conditions”. Destination management considers activities of DMOs, destination marketing management, destination policy, planning and development, human resource development and environmental management (Ritchie & Crouch, 2000).

Tourism destination management is considered to be under the responsibility of public sector actors whose aim is to “create an environment that provides maximum benefit to the stakeholders of the region while minimizing negative impacts” (Ritchie & Crouch, 2003, p. 148). However, destination management activities can be held by both public and private sectors. Among some activities of the public sector are the development of

national tourism strategies, marketing activities by the national tourism board and environment legislation. On the other hand, the activities related to the private sector are creation of tourism associations, industry involvement and funding of destination marketing programmes, and industry training programmes.

Dwyer, Mellor, Livaic, Edwards, and Kim (2004) found that Australian and Korean tourism stakeholders did not distinguish between destination management activities that are primarily the responsibility of the public sector (e.g. overall destination image, international awareness of the destination) and those which are the responsibility of the private sector (e.g. entrepreneurial quality of tourism businesses, cooperative behaviour of the firms). The study suggested that public and private sector collaboration is part of destination management activities.

Research on destination competitiveness has also emphasized the key role of DMOs and the firms that supply the services in the destination (Enright & Newton, 2004; Kompula, 2014) contributing to the overall destination experience (Buhalis, 2000). DMOs provide leadership for the management of tourism at the destination (Bornhorst et al., 2010) and several researchers and practitioners emphasize the role of DMOs in developing destination competitiveness (e.g. Dwyer et al., 2004; Gomezelj & Mihalic, 2008). Organizational structures of DMOs range from public organizations with authority to control resources and policies, to private organizations with only a cooperative marketing function (Ritchie & Crouch, 2003). For example, Zach and Racherla (2011) view DMOs as collaborating with destination businesses and operators in assisting them with the development and marketing of the destination.

In order to be able to focus on the competitiveness of a destination, a macro business perspective is required for the entire tourism industry, meaning that all stakeholders should work with each other by focusing on the common benefits of destination rather than on opportunistic objectives (Wang & Krakover, 2008; Zach & Racherla, 2011). Consequently, a stakeholder approach seems to be appropriate to analyse the complexity of the destination competitiveness issue (Hildebrandt & Isaac, 2015).

2.3. Stakeholder perspective in tourism

The organizational structure of a destination is considered a network of multiple and inter-dependent stakeholders (Cooper, Scott, & Baggio, 2009; D'Angella & Go, 2009), and the tourism experience offered by the destination depends of its stakeholders (Hawkins & Bohdanowicz, 2011; March & Wilkinson, 2009). The tourism literature views stakeholder types summarized in six broad categories: tourists, industry, local community, government, special interest groups and educational institutions (Butler, 1999; Hall & Lew, 1998; Markwick, 2000). A positive outcome of a tourism development plan is often based on the support of all the relevant stakeholders of the community (Bramwell & Sharman, 2000). Thus, stakeholder theory suggests that consideration should be given to all stakeholder groups that interact with each other in the tourism sector.

There are a number of tourism studies involving stakeholder analysis (e.g. Aas, Ladkin, & Fletcher, 2005; Byrd, 2007; Vernon, Essex, Pinder, & Curry, 2005). These studies suggest that stakeholder groups can influence tourism development in many ways, including tourism supply and demand, development initiatives and regulations (Bramwell & Sharman, 2000). Additionally, several authors have emphasized the importance of collaboration capabilities

of stakeholders for tourism destination development (Hassan, 2000; Komppula, 2014), since collaboration helps achieve common goals among all the stakeholders involved in tourism development (Fyall & Garrod, 2005). Therefore, all stakeholder groups should be considered for a systematic development of a tourism destination (Sheehan, Ritchie, & Hudson, 2007). Bornhorst et al. (2010) suggest that stakeholders can either provide coordination which increases success or cause fragmentation. The authors emphasize the role of the leadership style of the DMO and the degree to which it is stakeholder-oriented for success (Wang & Krakover, 2008). Thus, it is imperative to consider stakeholders' perspectives for managing tourist destination competitiveness (Dodds, 2007) and to highlight that stakeholders should be active participants in the tourism planning process (Byrd, 2007). However, and despite the rising interest in stakeholders, effective stakeholder involvement and collaboration is complex (Friedman & Miles, 2002). Collaboration is complicated due to the existence of multiple and diverse stakeholders that often hold disparate viewpoints (Ladkin & Bertramini, 2002; Markwick, 2000). Yet, to date, empirical research on issues involving stakeholders in the context of tourism is scant (Dodds, 2007).

Studies identifying how different stakeholder groups evaluate destination competitiveness are required for a better understanding of this concept (Pearce, 1992). However, only a few studies have investigated destination competitiveness from a supply-side perspective. Moreover, almost no research has considered destination competitiveness of countries in the South American region. Thus, stakeholder-related research is needed to understand the factors that drive or inhibit destination competitiveness from stakeholders' perspective for a South American tourism destination.

This paper seeks to provide insight from the supply-side perspective of destination competitiveness of Chile as a tourist destination. The specific purpose is to identify the perceptions of stakeholders regarding the factors that drive or inhibit the competitiveness of Chile as a tourism destination in the global marketplace. The main research questions are the following:

- (1) How do tourism stakeholders perceive tourism destination competitiveness and who are the most relevant stakeholders for destination competitiveness?
- (2) What are the perceptions of tourism stakeholders regarding the main drivers and inhibitors and the role of different stakeholders in the development of competitiveness of Chile as a tourism destination?

The results of this research are intended to provide insight and observations of theoretical and practical implications for destination competitiveness for other emerging market destinations within the South American region and in other parts of the world.

3. Research methodology

Given the relatively unexplored nature of the research topic (destination competitiveness from the stakeholders' perspective in a South American country), this study adopts an exploratory qualitative research strategy (Yin, 2009). Qualitative research provides a means of understanding phenomena within their context and exploratory methods, such as case studies, have been recognized as being particularly useful for examining travel and tourism phenomena (e.g. Komppula, 2014). Specifically, a qualitative case

study that relies on a single case is adopted, where there are no attempts at generalization beyond the particular case, but rather an interest in emphasizing what can be learnt from it (Stake, 2005). Several authors have suggested employing qualitative methodologies in tourism as they can help researchers to have a deeper understanding of specific topics through the voice of participants (Banki & Ismail, 2015).

The data for the study were obtained through personal interviews with key informants of the tourism industry in Chile (both private and public sectors). This approach is appropriate when applying surveys to respondents cannot provide specific in-depth information on a topic, or when informants are considered knowledgeable about the specific issues and able to communicate (Kumar, Stern, & Anderson, 1993). Particularly for this study, in-depth interviews facilitated the objective of understanding stakeholders' perspective on destination competitiveness since it allowed for open-ended questions that were better suited for obtaining this information.

The decision was made to use a convenience purposeful method of sampling. The selection of interviewee participants was based on their relevance for tourist destination competitiveness in Chile. Individuals considered for this research included those who were recognized sector leaders and active players in the Chilean tourism industry. Some stakeholder organizations had more than one potential respondent. With this concern in mind, stakeholder participants that were chosen for this study possessed a similar in-depth knowledge of the Chilean tourism industry. Thirteen in-depth, semi-structured key informant interviews were conducted with a representative selection of stakeholders of the tourism industry in Chile. Interviews were conducted during the second semester of 2014 by both members of the research team. The sample of respondents selected attempts to represent the main stakeholders of this industry: local government, tourism promotion boards, tourism trade unions, hospitality businesses, tourism education boards, tourism schools, tourism agencies and transport businesses. Table 1 presents the profile of the sample of respondents.

Semi-structured interviews allow interviewees to develop and speak extensively on the issues raised by the researcher (Finn, Elliott-White, & Walton, 2000). These interviews permit the flexibility of unstructured interviews, and at the same time, generate comparability to other interviews and to the key research question. The diversity in stakeholders being interviewed allows to identify different perspectives in viewpoints and opinions that contribute significantly to the quality of the results of this study.

Table 1. Participants.

Respondents	Service organization	Position
R 1	Tourism Marketing Board	North America market manager
R 2	Tourism Marketing Board	Manager products & destinations
R 3	Tourism Trade Union	Executive vice-president
R 4	Tourism Trade Union	General manager
R 5	Government Tourism Board	General manager
R 6	Government Tourism Board	Marketing manager
R 7	Chile Tourism Board	Vice marketing manager
R 8	Tourism Business Association	General manager
R 9	Tourism Educational Institute	National director
R 10	Tourism Business Association	Manager
R 11	School of Tourism	Director
R 12	Travel Agency Association	Director
R 13	National Transport Association	General manager

A semi-structured protocol was used to guide the interview process and ensure comparability among responses. Consistent with the main objective of this study and the research questions, the protocol included questions on perceptions of stakeholder participants regarding their view on destination competitiveness. Interview questions sought to explore the stakeholders' perceptions of drivers and inhibitors of destination competitiveness in general, and specifically regarding the tourism competitiveness in Chile. Respondents were also asked about their opinion on who were the relevant actors of this industry and their role in contributing to tourism competitiveness overall. Subsequently, the interviewer asked questions about the respondent's organization relationships with external stakeholders (public and private) of this industry. In addition, they were requested to provide their view on the role that the government boards and trade associations should play for the competitiveness of this industry. There was a discussion that sought information about the coordination among these entities to achieve a unified and aligned strategy. Further, respondents were requested to speak about their opinion on the main strengths and weaknesses of the current national strategy for achieving competitiveness in Chile as a tourism destination. This led to respondents' conversation about the tourism organizations' policies and practices and a discussion on what aspects of the strategy was working and which practices needed to be improved for tourism competitiveness. Finally, respondents were asked their opinion regarding which were the most salient attributes of the tourism industry that they thought attracted national and international tourists to Chile.

These interviews followed McCracken's (1988) long interview approach. Interviews were of a semi-structured nature and lasted an average of 90 minutes. Interview questions focused on identifying perceptions of opportunities, challenges and performance of Chile as a tourist holiday destination. Most interviews conducted in person; however, two interviews were conducted via telephone. All interviews were recorded and transcribed. For confidentiality reasons, the identities of respondents are not disclosed. These interviews provide a broader understanding of Chile's tourism industry and performance from the point of view of different stakeholders and result in valuable insights. In addition, secondary sources, such as web pages, press articles and information about the tourism industry, were analysed. The process of analysis and interpretation resulted in inferences that were used to generate insights and connections to the research question and previous research (Spiggle, 1994). Overall, interpretations of the data, which were triangulated with secondary data and institutional analysis, resulted in a number of common themes.

4. Findings

The findings of the study are presented according to the research questions. The analysis of each topic will consider the points of agreement between interviewees, and those opinions that were unique or contradictory among them.

4.1. Stakeholders' perception of tourist destination competitiveness

In general, the interviewees had different perceptions and understanding regarding the meaning of competitiveness for a tourist destination. Some respondents focused on specific elements of the destination, such as basic infrastructure and connectivity, and

the importance of developing a differentiated tourism offer in terms of attractions and activities, while others highlighted the overall tourist experience delivered by the destination and its superiority compared to equivalent or similar destinations. Considering all the opinions provided by the interviewees, it is possible to identify three main features that, according to the interviewees, determine the level of competitiveness of a tourist destination.

First, the destination must have an appropriate level of development in terms of services and destination offer (connectivity, infrastructure, safety, attractions, excursions, hotels, restaurants, etc.). Without these services, the destination cannot compete against other similar alternative tourist destinations. Second, the development of the touristic offer must consider some differentiation in order to provide a unique and superior experience to the tourist, a “memorable experience” that will make the tourist want to come back and/or to recommend the destination. Third, the destination must be located within the consideration set of potential tourists or be renowned worldwide, because in the tourism industry many of the potential customers are long-haul tourists located far away from the destination. According to the interviewees, this aspect is critical especially for a small and mostly unknown country like Chile, located far away from most popular tourist destinations. This awareness issue is emphasized by the following statements made by two interviewees:

First, to be competitive, you must exist” ... “You must be in the consideration set of the potential tourist. Once you are there, you must be attractive enough to be chosen by the tourist. (R. 1)

Another dimension of competitiveness is the way in which the destination is exposed, how is advertised. (R. 2)

A second insight that emerges from the interview data is that the concept of “memorable experience” will be contingent on the target segment considered and type of tourism activity. Therefore, the tangible and intangible attributes of the destination needed to deliver a tourism experience that will be different for leisure tourists, business tourists, or special interests tourists, among others. As a result, it is possible for a destination to be highly competitive for one specific segment (e.g. holiday tourists), and at the same time to be much less competitive for another segment (e.g. business tourists).

Most of the interviewees mentioned both public and private organizations as responsible for or contributing factors of the level of tourist destination competitiveness, providing evidence of some understanding of the complexity of the competitiveness matter. Also, they were able to differentiate those stakeholders in terms of their scope of influence and interest, distinguishing between local versus national stakeholders. Local stakeholders were defined as those with influence and interest focused on the specific destination competitiveness (e.g. local trade associations), and national stakeholders were defined as institutions with influence and interest on the competitiveness of the entire country (e.g. custom services). Using these two distinctions (type and scope) to classify the relevant stakeholders, as given in [Table 2](#), we can discuss the interviewees’ perceptions about the role of these stakeholders on the creation of destination competitiveness.

Public-national stakeholders identified by interviewees as determinants of tourist destination competitiveness were those directly related to the industry, such as the National

Tourism Office (Sernatur) and those indirectly related to the industry, such as customs services, infrastructure ministry, environment ministry and others. According to the interviewees, Sernatur is responsible for the national strategy, setting priorities, resources allocation and promotion of the tourism industry, and therefore its impact in competitiveness is very direct and relevant. The roles of customs services or infrastructure ministry are different, since they contribute to the general experience of the tourist, providing support services or infrastructure to the tourist.

Public-local relevant stakeholders mentioned by interviewees were regional offices of Sernatur, regional authorities, municipalities and regional offices of different ministries, such as infrastructure, environment and culture. Once more, Sernatur was considered a key stakeholder in terms of defining local priorities and resources for the tourism industry, whereas regional authorities, municipalities and regional offices of ministries were considered responsible of coordinating public organizations to provide support to touristic activities.

Interviewees also identified relevant private-national stakeholders, such as national trade associations (e.g. Fedetur), tour operators and educational institutions. The role of national trade associations was to be the “voice” of the private sector in front of the public sector, helping to define strategies and competitive challenges, and providing the members of the association with relevant information and some updates of the industry. Tourism operators are considered important for destination competitiveness, because they bundle tourism products and develop promotional activities to attract tourists. Finally, nation-wide educational institutions are considered important for competitiveness because they prepare specialized professionals for the industry.

Private-local stakeholders are local trade associations, and all the providers of products and services directly and indirectly related to the industry, such as hotels, excursion firms, private guides, restaurants and shops, among others. While the role of local trade associations is to coordinate private efforts and to work collaboratively with public authorities, products and services providers are the finally responsible of the tourist’s experience in the destination.

Finally, it is interesting to note that few interviewees mentioned the local community as relevant for competitiveness. For those who did it, the main reason was associated with the relevance of local people in delivering the decisive experience to the tourist.

Regarding coordination among relevant stakeholders, most interviewees declared that there is much room for improvement. One issue that emerged from the interviews as being problematic for competitiveness was the fact that even if public and private stakeholders have the same strategic priorities, their goals and priorities are very different.

Table 2. Relevant stakeholders behind destination competitiveness.

		Type of stakeholder	
		Public	Private
Scope of influence	National	National tourism service (Sernatur). Custom services, and ministries (culture, infrastructure, environment, etc.)	National trade associations, tour operators, and nation-wide educational institutions
	Regional/local	Regional office of Sernatur, regional authorities, municipalities, regional offices of ministries	Local trade associations, local providers of products and services, local educational institutions

Another interesting issue mentioned was the fact that the level of coordination among stakeholders differs between destinations, and also fluctuates over time. Stakeholders in some specific destinations have managed to work with high levels of coordination, whereas in other destinations coordination is completely absent. Additionally, it seems that coordination depends heavily on the capabilities of the managers involved, and therefore changes in local authorities sometimes have a significant impact in the level and quality of coordination. The variety of issues and aspects related to coordination problems are illustrated by the following comments:

Even at the government level, sometimes there is no coordination between the different related offices. (R. 3)

The strategic priorities of public and private sector are similar, but the day-by-day goals and priorities are different. (R. 5)

In some regions there is coordination between public and private sectors, in some others not. This is a problem, since coordination depends on regional actors and their willingness to act co-ordinately. (R. 7)

Interviewees agree that Sernatur is the most important coordinator among all the relevant stakeholders. According to respondents, Sernatur is the organization that should be responsible for coordinating a national tourism strategy that considers participants from the public and private (Patwardhan, 2004) sectors. In addition, Sernatur has an important influence in the process of allocation of resources and priorities for the industry, and should also have voice in the definition of resources and priorities in other related areas, such as infrastructure, education and environmental issues. In addition, Sernatur should coordinate the interaction between private parties and the government in order to modify or define laws and incentives to develop the tourism industry. Therefore, at the national level, Sernatur is a key stakeholder in the development of national competitiveness.

At the local level, Sernatur regional offices should coordinate the work of regional authorities, municipalities and regional offices of ministries with the private sector, either with local trade associations or with specific private participants, in order to develop nascent local destinations, and to improve the competitiveness of established destinations.

4.2. Stakeholders' perceptions of the main drivers and inhibitors of tourism destination competitiveness

In terms of the main drivers of tourist destination competitiveness, interviewees agreed that the most important driver was the recent and increasing consideration of the government placed on the tourism industry. In 2010, the government in place created the Sub-secretary of Tourism, a government office under the wings of the Ministry of Economy, oriented to develop the tourism industry. According to respondents, the emphasis given by national authorities on investing on this key industry for the economic development of the country has been the most important driver of destination competitiveness. This emphasis has led to the development of a national strategy for tourism development, with clear objectives and priorities, more resources for international promotion, and obtained from the interaction and dialogue between the government and the private sector.

A second important driver of tourist destination competitiveness mentioned by interviewees is the quality and sustainability certification programmes, which allow this industry to guarantee some basic standards in terms of the quality of hotels, and the sustainability focus of tourism service providers. This emphasis on sustainability is considered important in terms of the value proposition to tourist coming from developed countries whom are perceived as more concerned about environmental and sustainability issues.

Regarding the inhibitors of tourism destination competitiveness, there was less agreement and more variance among interviewees. First, some interviewees were very critical about the low importance given to the overall tourism industry in previous years, which led Chile to lag in tourism development behind other neighbouring destinations, such as Argentina, Peru and Brazil. In addition, respondents identified specific flaws, such as the low level of innovation and development of new touristic products, and the low quality of service, attributed to the low level of preparation of personnel due to high levels of rotation of personnel, which in turn was consequence of seasonality and inflexible labour laws.

A second issue that emerged among some interviewees referred to the problems associated to governmental changes every four years. Since Chilean electoral system does not allow immediate re-elections, every change in president has a negative consequence because top national and regional authorities usually change, and therefore most of the initiatives generated to develop the tourism industry were left unfinished. Further, coordination among main stakeholders was difficult, since coordination was very dependent on the persons involved, and every change of regional authorities is a return to the starting point. This aspect appears important for stakeholders, as detailed in the following statements:

One important weakness of the overall tourism strategy in Chile is the fact that every 4 years, when a new president is elected, most of the directors of the government offices change. This happens not only with government offices directly related to tourism, but also with other important governmental offices related to tourism, and the main authorities of the regions. (R. 8)

The national tourism strategy does not go beyond the government of the period. There is no national long-term policy of tourism. Although each government has a good intention, there is no continuity in the strategy or actions, they change with every new government. So, with every change in government, you start again from zero. (R. 10)

Third, some interviewees mentioned that Chile has some specific geographical features related with its location and its extension, which results in difficult accessibility, poor connectivity and high transportation costs. Respondents consider that these conditions hamper the destination competitiveness of the country.

Another important inhibitor was related to a low market orientation of the industry, in terms of lack of knowledge about the perceptions, experience and motives of tourists, and in terms of the absence of a strategy to target specific segments, such as convention tourism, business tourism or corporate tourism. For example, respondents mentioned that it is very difficult to find service providers who speak different languages. This has a negative effect on the service interaction with non-Spanish-speaking tourists and their overall experience. In addition, there is a lack of tourism products to incentive tourists

to spend more days in their chosen destination, which negatively affects the experience and the total and daily money spent by these tourists. Interviewees also perceive that although Chile is well positioned in terms of rational attributes such as safety and stability, it has no emotional appeal, which is considered a key aspect of a tourism value proposition, and therefore negatively affects the competitiveness of the country as a tourist destination. Finally, some specific issues emerged, such as the lack of a strategy to identify and develop new destinations, and the fact that some regions used their resources to do promotion independently with no strategy or plans, transforming those initiatives into waste of money.

5. Discussion

While research in tourist destination competitiveness has been prolific during the last decade, most of the research in the field has been conducted in developed countries, with a limited number of studies focused on developing countries. Additionally, most of the research on destination management has been focused on the demand perspective, with little attention devoted to the supply side considering a stakeholder perspective (Zehrer & Hallmann, 2015). Considering that lack of studies of destination competitiveness in developing countries from a supply-side perspective, the present research contributes to the literature by presenting the findings obtained from several interviews with a series of experts on the tourism industry. These experts can be considered as representatives of the main stakeholders involved in the development and management of a tourism destination, and their perceptions and opinions are extremely relevant in order to understand the complex process of destination competitiveness development in an emerging economy.

The main contribution of the present study is to identify the perceptions of stakeholders regarding the factors that drive or inhibit the competitiveness of Chile as a tourism destination in the global marketplace. Specifically, this study identified the perceptions of Chilean tourism stakeholders (supply side) regarding the main drivers and inhibitors and the role of different stakeholders in the development of competitiveness of Chile as a tourist destination.

First, it is interesting to note that despite some differences, all interviewees agree that destination competitiveness considers the classic features of necessary resources (natural and created), services and differentiation of the offer, proposed by traditional researchers in the field (e.g. Crouch & Ritchie, 1999; Dwyer & Kim, 2003; Ritchie & Crouch, 2003). However, interviewees also highlighted the importance of awareness and promotion of the destination in foreign markets as a central aspect of competitiveness. This feature seems to be extremely relevant since, according to most of the interviewees, the remote geographical location and small size of the country affects the visibility and convenience of Chile as a tourism destination. Therefore, it seems that the possession and development of distinctive resources and the ownership of a differentiated tourism offer will provide little competitiveness if the destination is unknown to potential tourists. Although some definitions of destination competitiveness consider the ability of the destination to attract and satisfy tourists (Enright & Newton, 2004; Tsai et al., 2009), this attraction component has been less considered by past research. This particular situation is probably the result of previous research being conducted in developed and established

destinations with high levels of awareness by potential tourists, and for which the attraction of potential tourists is not a concern. However, the importance of the attraction dimension of destination competitiveness might be completely different for destinations located in emerging economies, and consequently the future analysis of tourism destination competitiveness in developing countries should include this characteristic as a central part of the framework of analysis.

A second interesting issue concerning the relevant stakeholders behind destination competitiveness is related to the different roles of the public and private sectors in the development of a touristic destination, and the importance and leadership they must assume during the process. Although the traditional view of tourism destination management considers it as a responsibility of public sector actors (Ritchie & Crouch, 2003), our finding shows that, according to the interviewees, public and private sectors share this responsibility depending on the stage of development of the specific destination. Under this perspective, it seems that the development of a competitive tourism destination has two main stages. First, it is necessary to establish and develop specific tourist destinations within the country. In this stage, the main responsible and leader in the management of the competitiveness of the destination is the government, since it must identify locations and places with touristic potential, authorize tourism activities, evaluate environmental effects and provide the basic conditions of accessibility, connectivity and infrastructure to encourage private actors to invest in basic tourism services and attractions. The second stage is the development of the touristic destination. In this stage, the private sector has more responsibilities in the management of the competitiveness, since it is necessary to develop more sophisticated or specific products in order to have a deeper touristic offer, a better experience, and longer time of permanence of tourists. The public sector should provide support, both financial and technical, to facilitate this process. Consequently, our findings suggest that the main responsibility on the management of the competitiveness of a destination will transfer from the public sector to the private sector as the destination evolves from a nascent tourism destination to an established one. Therefore, tourism destination managers in the public and private sectors should identify the stage of development in which the destination is, and adjust incentives, support tools and coordination mechanisms to respond effectively to the different challenges faced during this process.

A third issue, related to the above discussed, is the clear distinction provided by interviewees about public and private stakeholders, both at the local and national levels. Previous research has acknowledged the existence of multiple stakeholders associated with the organizational structure of a destination (Cooper et al., 2009; D'Angella & Go, 2009), their relevance regarding the tourism experience offered by the destination (Hawkins & Bohdanowicz, 2011; March & Wilkinson, 2009), and the importance of the cooperative capabilities of stakeholders at the tourism destinations (Hassan, 2000; Komppula, 2014). However, little is known about the complexities of coordination and cooperation processes when local and national levels are considered at the same time. Our classification of relevant stakeholders provides a starting point to identify and analyse those complexities, and the cooperation and coordination activities among those stakeholders might foster or inhibit destination competitiveness.

Another relevant finding is the perception of the interviewees regarding the lack of touristic products and the low level of innovation in the industry. This is critical not only

because it hampers the competitiveness of the destination in terms of the attractiveness for tourists, but also because recent research shows that in order to contribute to destination economic growth, destinations need not only to be competitive and attract tourists, but also to capture high share of visitors' expenditures by offering locally produced products (Webster & Ivanov, 2014). Therefore, significant economic benefits derived from higher levels competitiveness will only be achieved by increasing the innovation and the development of new touristic products on the destination. While the role of private stakeholders in this area is crucial, the public sector should provide conditions to promote tourism-related entrepreneurship and to support innovation and new products development.

Additionally, it is interesting to note the almost no mention to environmental issues related to destination management. Recent definitions of destination competitiveness that take into consideration the sustainability dimension stress the importance of being competitive while preserving the natural capital for future generations (Crouch & Ritchie, 2005). However, it seems that relevant stakeholders in the tourism industry in Chile are not concerned about environmental and sustainability matters, although according to most of them, natural attractions are crucial and distinctive part of the Chilean experience. Therefore, and considering this lack of concern, balancing nature and development of a tourism destination in an emerging economy seems to be a difficult task. Nature, and especially untouched nature, is highly valued by tourists, which consider it a "luxury" to pay for. Therefore, an obvious recommendation should be to keep those places as untouched as possible, to maintain its attractiveness. However, to develop that destination, it is necessary to provide the place with some basic conditions, such as accessibility and basic infrastructure, which in turn may affect the natural attractiveness of the place. Without a sustainable approach to competitiveness development, managing this trade off and finding the correct balance between untouched nature and basic infrastructure seems to be a challenge for Chile and its environmental institutions, a challenge that is probably faced by other destinations located in emerging economies.

In addition, our findings suggest that the interviewed stakeholders consider that tourism strategy, both national and local levels, should be a state policy, not a government policy. It is recognized that in the development of destination competitiveness, public and private players of the supply side are essential (Dredge, 2006; Ritchie & Crouch, 2003), and that collaboration between the many stakeholders involved in tourism development helps to achieve competitiveness (Fyall & Garrod, 2005). It is also recognized that, while coordination among stakeholders increases success, lack of coordination among them inhibits success, and that leadership style and stakeholder orientation of DMOs are fundamental to promote that cooperation (Bornhorst et al., 2010). However, and according to most of the interviewees, government changes, even from the same political party of coalition, usually encompass changes in authorities at the national, regional and local levels, which usually includes DMOs' authorities. These changes obstruct the development of long-term relationships between relevant stakeholders, complicate the developing and implementation of long-term strategies, and deteriorate collaboration processes between public offices, and between public and private stakeholders. Consequently, in order to be successful, tourism destination competitiveness strategies should be coordinated and managed by public and private stakeholders with some degree of independence from changing government boards. While this long-term approach might be a current

condition in developed countries with more independent DMOs, this is not the normal situation in developing countries, and therefore special focus on this issue should be done by both practitioners and researchers.

Finally, tourist destination competitiveness, and its dimensions, has been studied either at the national or local level. While these studies have contributed to increase our knowledge about the determinants of destination competitiveness and the role of different stakeholders on it, little is known about the coordination and collaboration activities of relevant stakeholders with different scopes of influence. The importance of considering stakeholders and their different perspectives when managing tourism (Dodds, 2007; Hardy & Beeton, 2001), and the fact that collaboration among them is complex due to the existence of multiple and dissimilar stakeholders that often hold contrasting perspectives (Ladkin & Bertramini, 2002; Markwick, 2000) has been recognized. Most of the research in this matter has considered stakeholders with similar scopes of influence, either national or local, with no consideration of the complexities associated with collaboration and coordination between stakeholders with different scopes of influence, which probably have even more different viewpoints regarding tourism destination management goals and strategies. Therefore, expanding the level of analyses to a multi-level perspective seems to be a promising avenue to better understand the intricacies of the development of tourism destination competitiveness, especially in countries with varied and widespread tourism destinations.

Overall, the strategic planning of a tourism destination in a less developed region of the world is a complex task due to the interdependence of multiple stakeholders that require strong support from the local government. Planners and DMOs need to be aware of the potential drivers and inhibitors of developing a tourist destination as well as problems that arise during collaboration and implement appropriate actions to resolve them. Further research is needed to understand the stages and conditions under which this collaboration proves beneficial to the country.

Limitations must be noted based on the nature of this study. First, the sample itself was limited to Chilean stakeholders and this might not be generalizable to other countries with different levels of development and institutions. An extension of the present study can examine the perspective of stakeholders regarding other destinations in the region. Second, another weakness of this study lies in the fact that destination competitiveness can hardly be understood by only tourism stakeholders' perspective. Future studies should consider suppliers, residents and customers' perspective as well.

6. Conclusions

In conclusion, our study extends the previous literature on destination competitiveness in several ways. First, our study contributes to the analysis of the complex phenomena of destination competitiveness development from a supply-side perspective in a developing country. Despite the importance of the issue, this perspective and setting has been scantily studied by previous research in the field of tourism. Second, our findings show that different from established destinations in developed countries where a large amount of research has been conducted, awareness and promotion of the destination is extremely relevant for destinations in emerging economies, and therefore future analyses of destination competitiveness in developing countries must include this aspect.

Third, our study shed light on the different roles that public and private actors in the development process of a tourism destination, and the change in the leadership of this process from public to private actors as the destination evolves from its nascent stage to a mature and established destination. Additionally, our study provides a new dimension to analyse the complex relationships between relevant public and private stakeholders, including their scope of influence as an important variable to consider in future research. Fourth, our findings highlight the importance ascribed by relevant stakeholders to innovation in products and services in order to provide better experiences to visitors, and as a way to contribute to destination economic growth. Therefore, if developing countries want to derive economic benefits from higher levels of competitiveness, they must be able to create value to—and capture value from—visitors. Fifth, and based on the conducted interviews, we conclude that environmental and sustainability matters are not relevant aspects for most of the relevant stakeholders considered in our sample. However, these relevant stakeholders also recognize that one of the most important attributes of an emerging country like Chile is the “untouched nature”, and therefore it is possible to conclude that balancing the destination development with the maintenance of this attribute in a sustainable way is a key challenge for developing economies. Finally, we conclude that in Chile, tourism strategy is conducted as a government policy, which encompasses many detrimental consequences that complicate the developing and implementation of long-term strategies. Therefore, tourism strategy should be conducted as a state policy, with some degree of independence from changing government boards.

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