International Journal of Hospitality and Tourism Studies (IJHTS)

Volume.2, Issue.2, pp: 97-108
Dec (2021)

Article 1

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Received: 30/6/2021 Revised: 17/8/2021 Accepted: 21/8/2021

DOI: https://doi.org/10.31559/IJHTS2021.2.2.1

International Journal of Hospitality and Tourism Studies (IJHTS)

www.refaad.com

Journal Homepage: https://www.refaad.com/Journal/Index/8

E-ISSN 2709-0892 | P-ISSN 2709-0884

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Abstract: Gulf countries are witnessing unprecedent economic challenges to address the sharp decline on oil demand due to the drop in international commerce and transportations because of Covid-19 Pandemic crisis. This paper examines the roles of tourism authorities in the Arab region in managing and marketing tourists' destinations drawing upon the case of Saudi Arabia. The later represents a special case worth of study because it is undergoing a transition from purely religious to leisure tourism phases. This situation has prompted the author's attention to answer several questions such as what are tourism competitiveness indicators of the country, how its tourism sector is governed and equiped with qualified personnel , and how Saudi Arabia is marketed as a leisure destination?

To answer these questions, the paper starts with identifying the determinants of tourism competitiveness through the review of literature. In addition it conducted a quantitative analysis of Travel and Tourism Competitiveness Index (TTCI) to stand on the comparative competitive position of the country with fifteen well established tourists' destinations in the region. Secondary data was supplemented by face-to-face interviews and online surveys. A purposive sample of one hundred and twenty employees working in the Saudi Tourism Authority in Riyadh specializing in marketing, human resources and information systems was selected from six hundreds officials working in the authority. Data collected was analyzed using SPSS version 22. The results indicated three levels of tourism performances as low, average and good in Saudi Arabia. Main gaps were identified and a suggested framework was proposed to address them.

Keywords: *tourism competitiveness; destination management and marketing; Gulf region; Saudi Arabia.*

1. Introduction

Many countries of the Middle East try to diversify their sources of income to ensure sustainable economic development. Recently, Saudi Arabia has joined other Gulf countries especially Dubai and Qatar to generate alternative sources of national from non-oil sectors such as from tourism. In 2019, the country has opened for the first time tourism visa to ninety countries around the world. The shift in Saudi tourism policies prompted the creation of government entities to govern and sustain tourism development such that of the Saudi Tourism Athority (STA). The STA was later transformed to a ministry to assume greater roles as Destination Management Organizations (DMOs) enhancing inbound and outbound tourism. Studies show that the country has great potentials for leisure and entertainment tourism; nevertheless, it faces a main challenge being conceived primarily as a destination targeting religious tourism for Hajj and Oumra. Besides, the country is encountering fierce competition from other well established tourists' destinations in the region such as Dubai, Qatar, and Egypt. In fact, figures indicate that tourism makes up to 3.5 percent of GDP in Saudi Arabia; however, it accounts only for 10 percent of GDP globally .The paper addresses several significant questions. The first is how to increase leisure tourism to a destination that is primarily perceived as a religious destination? Second, how to improve indicators of tourism competitivenes in this country through effective management, marketing, and proper governance of the sector? What are the main impediments facing this country to expand its tourism industry? And how to overcome them?

The paper is divided into three parts. The first part reviews the literature on concepts of competitiveness, approaches to evaluating tourism performance, perspectives on tourism as a system and the role of Destinationa Management Organizations (DMOs) in promoting tourism. In addition to literature survey, this part includes the analysis of Saudi Arabia key performance indicators in light of the Internation Travel and Tourism Competitiveness Index (TTCI) included in the World Economic Forum report (WEF,2019). This part ends with formulating research questions and hypothesises. The second part includes the research methodology, the field study and interviews with officials working in the Saudi Tourism Authority in Riyadh City . The third parts includes the research results, the discussion, the suggested framework to achieve a higher competitive position in international tourism market and the conclusion.

2. Review of Literature

2.1. Tourism Competitiveness

Developing countries encounter several difficulties to strengthen their destinations' positions in increasingly competitive and global markets of tourism (Crouch, 2007), Beerli, and Martín, (2018), Alastair, (2019). Moreover, scholars note the complexities of evaluating the competitiveness of a particular destination. (Enright & Newton, 2004, p.777); Enright, M.J., Newton, J. (2005) Dwyer, Kim,(2003, p.371), Nazmfara, Eshgheia, pp.501-503). Current literature indicates limited research on studies assessing the impacts of destination management and marketing on tourism performance of a destination. Scholars pinpoint moreover this research gap especially in studies on countries of the Middle East and North Africa (MENA) region.

In addition, scholars note that measuring tourism competitiveness is a complex process. For example, Kim (2000) defines tourism sector competitiveness as "the capacity for the environmental conditions of the tourism market, tourism and human resources as well as the tourism infrastructures of a country to generate added value and boost overall national wealth." Crouch further explains that "…tourism managers and practitioners can measure destination competitiveness by checking the explicit competitiveness factors specific to the destination life cycle" (Crouch, 2010, p.28). Kim further notes that

Tourism sector competitiveness is not only a measurement of potential capacity but also an evaluation of the present capacity and the sector's actual level of performance." To encounter issues regarding the evaluation of tourism performance, other scholars suggest the use of primary data (Faulkner, Oppermann, Fredline, 1999; Hudson, Ritchie, and Timur, 2004; Kim & Dwyer, 2003; Enright & Newton, 2004, 2005; Crouch, 2007). However, Gooroochurn and Sugiyarto highlight the importance of the use of secondary data to supplement the primary data (Gooroochurn & Sugiyarto, 2005, p.162). Moreover, they explain that there is a gap in the literature regarding studies simultaneously deploying primary and secondary data for measuring the regional competitiveness of tourism destinations. This research gap exists generally in developing countries and especially in the case of Saudi Arabia.

Scholars further draw attention to the importance of considering sector sustainability when measuring the competitiveness of the tourism sector. From the perspective of Malakauskaite and Navickas (2010), tourism sector competitiveness is similar to the competitiveness of any other economic sector; hence, we cannot tackle it in isolation from the harmonious and sustainable development of tourists' destinations. The United Nations World Tourism Organization (UNWTO, 2018), especially emphasizes that: "sustainability will remain the mainstream in the future of tourism". In their reports, the UNWTO defines sustainable tourism as the "tourism that takes full account of its current and future economic, social and environmental impacts addressing the needs of visitors, the industry, the environment, and host communities". The reports further explain that: "...tourism development needs to be sustainable not only economically but also in socio-political, technological, natural, ecological, and cultural terms." On the other hand, Hassan (2000) pinpoints the importance of environmental sustainability as one of the "four determinants of tourism competitiveness." Ritchie and Crouch further claim that "…competitiveness is illusory without sustainability" (Ritchie& Crouch (2000, pp.1-7). Besides, they explained that sustainability is "…the ability to increase tourism expenditure, to increasingly attract visitors while providing them with satisfying and memorable experiences." Ritchie and Crouch also noted that "sustainable tourism should be undertaken profitably, meaning that it should enhance the well-being of destination residents and preserve the natural capital of the destination for future generations."

To address the difficulties of evaluating tourism competitiveness, several authors tried to build composite indicators to measure the competitiveness of tourist destinations. For example, Dwyer and Kim (2003) created the Competitive Indicators of a destination to determine the essential factors for the competitiveness of a region. They included in these indicators: the support factors, general infrastructure, service quality, accessibility of the destination, and destination management elements. Other scholars, such as Crouch and Richie emphasized the concept of competitive advantages as the effective use of resources and the comparative advantages as "the resources endowments represented by the natural or synthetic attributes that attract visitors to a destination in the long-run". More significantly, Crouch and Richie explain that destination competitiveness depends on four major sets of factors. They identified these factors as the "qualifying determinants" (e.g. location, safety, and cost, etc.), "destination management" (marketing, quality of services, experience, and information, etc.), and the "core resources and attractors." They considered the latter as the key motivators for visitors choosing one destination over another. They also added destination physiography, climate, and "supporting factors and resources" (such as infrastructure and transportation services). More significantly, Crouch and Richie added to the original set of factors another one, which they called "destination policy, planning, and development". They argued that a policy-driven framework would provide a guiding hand to the direction, form, and structure of tourism development; hence, it will ensure the competitiveness and sustainability of tourists' destinations. Crouch and Ritchie, moreover, assert that "destination policy and planning" require an explicit recognition of the role of various stakeholders in tourism decisions. They added many other factors to the previous determinants such as hospitality and political forces, finance and venture capital, human resource development, visitor management, and crisis management to "the destination management group". They claimed that the new factors represent the greatest scope for managing destination competitiveness and sustainability.

Crouch and Ritchie's early work on the aforementioned factors laid the foundation for further scholarly research that helped to identify more precisely the set of indicators needed to measure destinations' performance. Besides this set, they included subjective (opinions, perceptions, and imagery, etc.). They added as well other objective indicators (quantitative such as tourism demand, tourist arrivals, spending, and public/private finance, etc.). Dwyer and Kim (2003) based their study on the earlier work of Crouch and Ritchie. They developed a demand model of destination competitiveness that enabled comparison between countries. They based their studies on that of Crouch and Ritchie (1999, 2003), but they argued that demand is an important determinant of tourism competitiveness, which was not mentioned by Crouch and Ritchie (2003). However, Dwyer and Kim explained that tourists' preferences and motivations influence the types of products and services offered in a given destination. Nevertheless, their model was described as incomplete as it lacked in empirical support due to the poor reliability and validity between factors presented (Azzopardi and Nash 2017; Hudson, 2004). Other scholars such as Hong (2009) criticized Dwyer and Kim's model as it examined demand factors in qualitative terms rather than quantitative terms.

We conclude from the aforementioned overview that tourism has many facets and there are several methods to evaluate its performance. These facets include physical, human, environmental, and policy-making factors. However, tourism has been rarely tackled from a "system perspective" even though the latter helps to comprehend its complexity from a macro-level of analysis. We explain the importance of this perspective in the following part.

2.2. Tourism as a "System"

At the macro level, the system framework is useful to understand the interrelated and dynamic nature of the tourism sector. Such as, it requires public policies, structures, physical, non-physical resources, and tools to achieve certain outputs. Scholars began to discuss the tourism system in the 1970s. They suggested several types of tourism system models (Pearce, 2014, p.142; Leiper, 2000, p.508; Sedarati, Pintassilgo, 2018, p.23). Moreover, Chang, Hong, and Lee (2008) proposed a system's model to evaluate coastal zone management in Taiwan, whilst Chen, Chang, and Chen (2014) built a model to capture the dynamics of socio-economic variables and the environment to manage a wetland area for yacht tourism in Taiwan.

Other authors such as Leiper (2000, p.510) proposed a tourism system including supply and demand from the view of "structure-function." Leiper suggested a tourism system model based on the relationship between tourists and destinations. His model included tourists, the tourism industry, tourist-generating regions, travel channels, and destinations. Mill and Morrison (2018, p. 101) introduced another model in their textbook titled "The Tourism System". They explained that "the tourism system consisted of four parts (destination, marketing, demand, and travel) and four links (the tourism product, the promotion of travel, the travel purchase, and the shape of travel)." Their model was more comprehensive and complete than previous models since it introduced other concepts including marketing, consumer behavior, and sustainable tourism development while also acknowledging the open-system nature of tourism and the major impacts of externalities.

On the other hand, Cook and Taylor made significant contributions to explain the tourism system. They highlighted in their model important participants and forces that shape the tourism industry. They organized these participants and activities on three interrelated bands. At the center of their model, tourists assume the focal point, surrounded by tourism promoters (composed of travel agents, incentive and meeting planners, direct marketing, tourist board, and tour operators) who provide tourists with information and other marketing services. Moving to the next band, Cook and Taylor included tourism key service suppliers who provide transportation, accommodations, food and beverages, attractions, entertainments, and destinations to travelers. In the third band, the system is composed of the external environment that includes economy, politics, technology, environment, and society culture. They note that the external forces "may range from subtle changes to more dramatic changes, which have immediate impacts on the tourism sector. Such changes may take the forms of currency devaluations, wars, fuel shortages, natural disasters, health crises, and economic conditions" (Cook & Taylor, 2018, p.21). Relevant to the current study, the system perspective helps to capture the dynamic and interrelated features of tourism. It particularly emphasizes the role of government in setting tourism policies and structure tourism sectors in different forms according to their socio-economic and political systems. One of these important structures is Destination Management Organizations (DMOs). We elaborate on the tasks and responsibilities of these structures in the following part.

2.3. Roles of Destination Management Organization (DMOs)

Governments create Destination Management Organizations (DMOs) to lead, market, provide a suitable environment, and deliver on the ground tourism products and services (UNWTO, 2007, pp.155). Moreover, countries depend on these organizations to coordinate the efforts of many stakeholders to achieve the destination's vision and goals for tourism (Morrison, 2018, p.6). Current literature also refers to DMOs with varying names and structures, whether fully public government institutions or mixed structures composed of public-private (PP) organizations. In all cases, the literature indicates that DMOs are significant policy tools in charge of improving tourism sector performance (UNWTO, 2019**)**. Despite the importance of DMOs, the research indicates insufficient investigation about their functions as well as their critical roles in achieving overall tourism competitiveness, especially in developing countries.

In fact DMOs extent of efforts to promote touristis' destinations depend on the stage of destination development. For example, several UNWTO reports pinpoint that the marketing efforts of DMOS are determined by destination context, destination maturity, level of decentralization, and priorities in the destination, resources (UWTO, 2007, 2018, 2019). Porter supports the later view and asserts that tourism marketing depends mostly on the destination life cycle. (Porter & others, 2001). He asserts that all destinations experience five distinct phases of development: exploration, involvement, development, consolidation, and stagnation. (2017).Understanding the destination life cycle is therefore important to help governments setting priorities of destinations promotion. In the case of emerging destinations such that of Saudi Arabia, it is therefore worthwile investigating such policies.

In addition to understanding marketing strategies, there is a drastic need to empower DMOs through proper governance. Beerli (2007) defines destination governance as "setting and developing rules and mechanisms for a policy, as well as business strategies, by involving all the institutions and individuals." He explains that destination governance relates to how a DMO is managed and who does the administering. A common way to administer DMOs in most countries is through the public sector with little private sector involvement. However, a recent survey completed by UNWTO indicates that their governance has shifted rapidly from a traditional public-oriented model to a more corporate one (UNWTO, 2010). In most developing countries -of which Saudi Arabia makes no exception- the functions of marketing and managementof tourists' destinations are undertaken by the public authorities.

2.4. Developing Research Questions and Hypothesis

It is apparent from the literature that a gap exists in research with regard to comparing indicators of tourism competitiveness with perceptions of those indicators amongst employees of destination management organizations. It is assumed that these perceptions are mediating factors to identify current performance weaknessess and hence set priorities for their improvements at the planning phase of tourism policies. We attempt to examine those factors in the case of Saudi Arabia based on the Analysis of Travel and Tourism Competitiveness Index (TTCI) issued by the World Economic Forum (WEF, 2019). The (TTCI) index ranks country destinations based on fourteen core elements that indicate tourism competitiveness (Table 3). The main goal of TCCI is to measure factors and policies, which influence the attractiveness and development of the tourism sector in different countries. Fourteen core elements make up the index and have the potential to drive competitiveness and returns in tourism arrivals and receipts. Table (1) summarizes the Middle East and North Africa (MENA) region scores for each of the fourteen core elements, followed by the ranking of the countries respective to the score.

We categorized the Saudi tourism performance in light of the TTCI scores including the fourteen core elements of competitiveness into "low", "average", and "good" performing. We based our categorization on the value of the scores assigned to each core element. We undertook this categorization as follows: the highest score for the indicator is six and the lowest score is one. Thus, indicators, which score from (1-to-2), are considered low performing indicators, scores from (3-to-4) are considered average performing indicators, and scores from (5-to-6) are considered good performing indicators.

Based on this analysis, we could derive indicators of competitiveness in Saudi Arabia and rank them into "low", "average" and "good" performing indicators. Based on table (3), the business environment is ranked first in UAE and Qatar respectively while in SAUDI ARABIA it is ranked in the fourth position. SAUDI ARABIA ranks third compared to UAE, which ranks in the second position concerning safety and security indicator. In the case of health and hygiene indicators, SAUDI ARABIA scores well with the second position when compared to UAE and Qatar in the fourth and fifth positions respectively. In terms of international openness, Qatar, UAE, SAUDI ARABIA are ranked 1st, 4th, and 12th respectively.

The price competitiveness indicator ranking of SAUDI ARABIA and Qatar is in the sixth position and that of UAE is in the 11th position compared to other MENA regions. This shows that prices need to become more competitive among the countries of the MENA region to amplify its biggest advantage relative to the global average. This is regarded as the most important economic influence on destination shares of total travel abroad. Therefore, it is important to pay particular attention to the price competitiveness of a nation's tourism industry, as compared to that of its competitors, to prosper as an emerging tourist destination.

UAE scores second position, Qatar in the third position whereas ranks SAUDI ARABIA ranks in the sixth position in terms of environmental sustainability. SAUDI ARABIA scores third position in air transport infrastructure, with Qatar at the second position and UAE in the first ranking. When economies begin performing well along with a broad range of core elements, they begin to surpass the global average in travel and tourism competitiveness. In the case of the "Ground and Port Infrastructure", the ranking of UAE is third, Qatar is second, and SAUDI ARABIA is fifth respectively. In the case of "Human Resources and Labor Market, SAUDI ARABIA (fourth rank) is behind UAE and Qatar with second positions respectively. In the case of ICT, UAE occupies the first rank while SAUDI ARABIA is far behind with the seventh rank. Regarding the pillar "Prioritization of Travel & Tourism", UAE and SAUDI ARABIA are ranked in fourth and fifth positions respectively. Regarding "Tourists Services infrastructure", UAE ranks first, Qatar ranks fourth, and SAUDI ARABIA ranks third respectively. The ranking of natural resources for SAUDI ARABIA and its biggest competitors are UAE (fourth), Qatar (tenth), and SAUDI ARABIA (ninth) respectively. The cultural resources and business travel ranking for the selected MENA regions are UAE (third), Qatar (seventh), and SAUDI ARABIA (eighth) positions respectively. The outcomes of the analysis of the fourteen core elements of tourism competitiveness in terms of their TTCI 2019 scores and then their ranking for SAUDI ARABIA among the MENA region are shown in table (1).

Table (1): Analysis of Travel and Tourism Competitiveness Index (TTCI)

Source: Based on Travel and Tourism World Economic Impact,2019, WTTC

Countries	Global Rank	Business Environment	Safety & Security/	Health & Hygiene/	H.R &	ICT/ Rank	of Travel Tourism/	Int. Openness	Countries	Price Competi- Rank	Environ. Sustainabilit	Air Transport	Ground and Port Infrast.	Tourist Service	Natural Resources/	Cultural resources
UAE	33	5.6 /1	6.3 / 2	5.4 / 4	5.1 / 2	6.4 /1	4.7 /4	3 / 4	**UAE**	5.5 /11	4.5 /2	5.7 /1	4.5 / 3	5.6 / 1	2.4 / 4	2.2 / 3
Qatar	51	5.6 /1	6.3 / 2	5.3 / 5	5.1 / 2	5.6 /4	4.4 /7	3.5 /1	**Qatar**	5.9 /6	4.4 /3	4.5 /2	4.7 / 2	5 / 4	1.8 / 10	1.4 / 7
Israel	57	5.1 /5	5.5 / 8	6 / 1	5.3 / 1	5.9 /2	5 /3	2.5 /8	**Israel**	3.6 /13	4.3 /4	3.6 /4	4.4 / 4	5.4 / 2	2.3 / 5	1.7 / 6
Oman	58	5.3 /3	6.5 / 1	5.3 / 5	4.6 /4	5.3 /6	4.7 /4	2.8 /6	**Oman**	5.7 /8	4.4 /3	3.4/6	4.4 / 4	4.1 / 6	2.3 / 5	2/ 4
Bahrain	64	5.4 /2	5.9 / 4	5.2 / 6	4.9 /3	5.8 /3	4.5 /6	2.9/5	**Bahrain**	5.8 /7	4.1 /5	3.5 /5	5.2/ 1	4.6 / 5	1.6/ 11	1.2/ 9
Egypt	65	4.4 /9	4.8 / 11	5 / 7	4.3 /5	4.3 /12	5.2 /1	2.2/10	**Egypt**	6.5 /2	4.7 /1	3.3/7	3.4/ 6	3.2 / 10	3/ 2	3.3/ 1
Morocco	66	4.9 /6	6 / 3	4.6 / 8	4.1 /6	4.6/9	5.2 /1	3.1/3	**Morocco**	5.6/10	4.5 /2	3.2 /8	3.5 / 5	3.9 / 8	3.1/ 1	2.2 / 3
SAUDI ARABIA	**69**	**5.2 /4**	**6 / 3**	**5.7 / 2**	**4.6/ 4**	**5.2 /7**	**4.6 /5**	**1.6/12**	**SAUDI ARABIA**	**5.9/6**	**4 /6**	**4.1 /3**	**3.5 / 5**	**5.1 / 3**	**1.9/ 9**	**1.9 / 5**
Jordan	84	4.6 /8	5.7 / 6	5.4 / 4	4 /7	4.8 /8	5.1 /2	3.3 /2	**Jordan**	5.3 /12	4.3 /4	2.7 /9	2.9/ 9	3.8 / 9	2.2 / 6	1.3 / 8
Tunisia	85	4.4 /9	5.2 / 10	5.2 / 6	4.1 /6	4.4 /11	5 /3	2.6 /7	**Tunisia**	6.1 /4	4.4 /3	2.5 /11	2.8 / 10	4.1/ 6	2.6 / 3	1.4/ 7
Iran	89	3.9 /11	5.4 / 9	5 / 7	4.1 /6	4.5 /10	3.7 /8	2.4 /9	**Iran**	6.7 /1	3.9 /7	2.5 /11	3.1 / 8	2.8/ 11	2.4 / 4	2.8 / 2
Kuwait	96	4.7 /7	5.8 / 5	5.6 / 3	4.3 /5	5.5 /5	3.6 /9	1.9/11	**Kuwait**	5.6 /9	4 /6	2.6 /10	3.3 / 7	3.9/ 8	1.8 / 10	1.1/ 10
Lebanon	100	4 /10	4.8 / 11	5.6 / 3	3.9 /8	4.1/14	5/3	2.5 /8	**Lebanon**	5.5 /11	4.1 /5	2.5/11	2.8 /10	4 / 7	2 / 8	1.4 / 7
Yemen	140	3.5 /12	3.2 / 12	4.1 / 9	3 /9	2.4 /15	2.1 /11	1.3 /14	**Yemen**	6 /5	3.4 /9	1.2 /13	2 / 11	1.9 / 12	1.8/ 10	1.3/ 8
Algeria	116	3.9 /11	5.6 / 7	5.2 / 6	4.1 /6	4.2 /13	3.1 /10	1.5/13	**Algeria**	6.2 /3	3.5 /8	2.2 /12	2.8/ 10	1.8 / 13	2.1/ 7	2 / 4

Table (2): Evaluation of SAUDI ARABIA Tourism Competitiveness Indicators Based on TTCI Analysis

Low Performing Indicators	Average Performing Indicators	Well Performing Indicators
1-Price Competitiveness	6-Business Environment	11-Health & Hygiene
2-Environmental Sustainability	7-Human Resources	12-Safety and Security
3-Information Communication Technology (ICT)	8-Prioritization of Travel and Tourism	13-Air Transport Infrastructure
4-Natural Resources	9-Ground Transportation Infrastructure	14-Tourists Services Infrastructure
5-International Openness	10-Cultural Resources	

Table (2) pinpoints to the low performing indicators (price ompetitiveness, enviromental sustainability, ICT, natural resources and international openess), the average performing indicators include: business environment, quality of human resources, the average prioritizatoin of Saudi government of travel of tourism, the need to improve ground transportation, and the cultural resources. As for the well performing indicators include: health and hygiene,safety and security, air transport infrastructure and tourists' services.

Based on the literature review and the TTCI analysis, we could therefore develop the following hypothesises to be assessed in the current study:

H1= Perceptions of employees on Saudi tourism competitiveness will coincide with those analyzed under the TTCI

H2= Tourism sector is adequately structured and empowered.

H3= The sector sustainability is ensured through tourism plans that promote the well-being of local communities.
H4= Functions of management and marketing are adequately provided to promote destinations.
H5= Tourism is enough attractive and will likely increase leisure tourism demand on Saudi Arabia.

3. Research Methodology

Table (3) shows the main themes of constructing the questionnaire. It included fourteen questions corresponding to tourism indicators specified under the ITTC Index (see table 2). In addition, it included another eitghteen questions asking respondents about the marketing and management activities peformed by the Saudi Tourism Authority and another four open ended questions to allow respondents to elaborate on the country tourism demand factors. The questionnaire was examined and validated by a panel composed of twenty Saudi tourism experts. Questions were based on likert scale from 1 to 5 (1-being poor-2-average,3-good,4-very good and 5 excellent) (see, supplement # 1). A purposive sample was selected from employees working in the Saudi Tourism Authority to answer the questionnaire . The sample comprised hundred and sixty respondents assuming different positions in management, marketing, and human resources training and development. Out of one hundred and sixty employees, one hundred and fifteen employees responded to the questionnaire which was an accepted rate of response. The questionnaire comprised questions on demographic data about respondents' age, gender, university qualifications, and expertise. (see supplement #2). Ninety percent of respondents were males and 10% were females. All respondents aged between thirty and forty years old. All respondents had university qualifications in tourism, marketing, human resources and IT management. All respondents expressed their interests in promoting domestic and international tourism as pre-requisite question before attempting to answer the main survey questions.The survey was divided into four sections. Section 1 included questions on management and marketing services provided by Saudi Tourism Authority (STA) to promote domestic and international tourism, section 2 included questions on the structure and governance of the authority, section 3 included questions on tourism sustainability, and section 4 included questions on demand factors on Saudi tourists' destinations. Each question was edited in Arabic with a translated version in English. The questionnaire was emailed to employees via Google forms and answers were analyzed using SPSS version 22.

Table (3): Construct of Questionnaire based on Review of Literature and TTCI Analysis

Main Pillars of Competitiveness identified via literature review and TTCI Analysis	Items/Questions
Management and marketing services provided tourism authority to promote tourists' destina	- What are the services provided by the authority to enhance the managerial and marketing capacities, equip and train personnel, development of tourism products and services (World Tourism Organization (2019).
Sector Governance	-Extent of the authority participation in setting tourism policies and strategies. "destination policy, planning and development (Crouch and Ritchie (2003)
Sector Sustainability	- Tourism efforts to ensure socio-economic development and sustainable tourism (UNWTO 2018 & 2019)
Tourism Demand Factors	-Evaluation of experts about points of attractions and demand factors on tourism to Saudi Arabia
Tourism Indicators of Competitiveness	-Evaluation of respondents to performance indicators revealed by the TTCI analysis of World Economic Forum

4. Results

4.1. Respondents' Views on the Categorization of Performance Indicators as Per the Analysis of (TTC) Index

Table (4) indicates that 32 respondents (48%) answered that prices are "average" while the WEF analysis categorized prices amongst the "low performing indicators." As for the environmental sustainability, ICT, natural resources, and international openness, respondents' answers considered them as "average performing indicators" while they were categorized as "low performing indicators" according to WEF analysis.

Respondents' answers to WEF categorization including business environment, trained human resources, tourism policies, quality of ground transportation, and historical resources described this group of indicators in different percentages. Moreover, 34 respondents (51%) evaluated the business environment as "average." Besides, 34 (54%) considered the training provided by STA to tourism personnel as "average", and 30 respondents (45%) considered however that tourism policies are performing well while 28 respondents (42%) considered the quality of ground transportation as "average", and 35 respondents (53%) considered the historical and cultural resources as "good" (Table 5). Respondents' answers to the third group of competitiveness indicators including health & hygiene, safety & security, air transport infrastructure, and tourists' services indicated that 32 respondents (48%) considered health & hygiene as "average", 46 respondents (70%) considered safety & security as "good", air transport infrastructure as "average", and tourists' services infrastructure as "average" (Table 6). To sum up, the overall respondents' answers to the TTCI classifications mostly fell under the classification of "average performing indicators" versus "low" as per our analysis of the TTCI.

Table (4): Officials' Evaluations of SAUDI ARABIA Tourism Performance as "poor" (Classified under TTCI as "average")

Indicator	Ranking	Freq.	(%)
Prices	Poor	20	30
	Average	32	48
	Good	14	21
Environment Sustainability	Poor	22	33
	Average	36	54
	Good	8	12
Information &Communication Technology	Poor	16	24
	Average	26	39
	Good	24	36
Natural Resources	Poor	9	14
	Average	25	38
	Good	32	48
Int'l Openness	Poor	12	18
	Average	31	47
	Good	23	35
Total		**66**	**100**

Table (5): Officials' Evaluations of SAUDI ARABIA Tourism Performance as "average" (Classified as "average" under TTCI)

Indicator	Ranking	Freq.	(%)
Business Environment	Poor	22	33
	Average	34	51
	Good	10	15
Trained Human Resources	Poor	19	29
	Average	36	54
	Good	11	17
Tourism Policies	Poor	11	17
	Average	25	38
	Good	30	45
Quality of Ground Transportations	Poor	20	30
	Average	28	42
	Good	18	27
Historical & Cultural Resources	Poor	4	6
	Average	27	41
	Good	35	53
Total		**66**	**100**

Table (6): Officials' Evaluations of SAUDI ARABIA Tourism Performance as "average" (Classified as "good" under TTCI)

Indicator	Ranking	Freq.	(%).
Health &Hygiene	Poor	12	18
	Average	32	48
	Good	22	33
Safety &Security	Poor	3	4
	Average	17	26
	Good	46	70
Air Transport	Poor	12	18
	Average	29	44
	Good	25	38
Tourism Services	Poor	20	30
	Average	33	50
	Good	13	20
Total		**66**	**100**

4.2. Respondents' Views on Services Provided by the Tourism Authority

Twenty three respondents (34%) considered the marketing and promotions of tourists' destinations as "good". However, 22 respondents (33%) considered prices of tour packages offered by the authority as "poor", and 18 respondents (27%) considered the government's policies to promote tourism are very good. In addition, 23 respondents (35%) considered believed that digital marketing and communication technologies are good, and 26 respondents (39%) considered government monitoring of tourists' destinations as average. While 14% considered training and capacity building training program organized by the authority as "average". The analysis of this group of questions indicates that tourism officials' evaluations of the marketing and management functions offered are between "average" and "good", but their evaluations of these functions never reached "very good "or "excellent" (Table 7 Pillar 1). Regarding "Tourism Sector Governance", 19 respondents (29%) considered establishing new tourism entities with expanded responsibilities as a very good government initiative, 19 respondents (29%) considered the participation of stakeholders in tourism planning as "good" (Table 8 Pillar 2).

Concerning the third Pillar of "Tourism Sustainability", 16 respondents (24%) considered government policies encouraging tourism investments as "good", while 17 respondents (26%) considered the government efforts to ensure socio-economic development as "very good", and 25 respondents (38%) considered the increase of employment in the tourism sector "excellent" (Table 9 Pillar 3).

About the Fourth Pillar of "Leisure Tourism Demand Factors", 19 of 49 experts (39%) considered indicated that there is a variety of accommodations and they considered it "very good", however, 27 officials (49%) believed that the prices are higher compared to other regional destinations. Thirty-five percent of Saudi experts considered the SAUDI ARABIA climate attractive, 19 experts (39%) considered natural wonders as "very good", 16 experts (33%) considered events & festivals as "very good", and 19 experts (39%) considered food variety as "very good". Worth to note that the evaluations of tourism experts of destination demand factors hardly reached a scale of "very good" to the main attractiveness factors such as accommodations prices, which they considered "poor" and "costly". In sum, the overall respondents' answers to all questions included in the Four Pillars of Tourism Competitiveness (FPTC) Model have hardly reached a scale of "excellent" (Table 10 Pillar 4).

Table (7): Pillar 1- Marketing & Management Services Provided by STA

Variable	Ranking	Freq.	(%)
Marketing of Tourists' Destinations	poor	16	24
	Average	8	12
	Good	23	35
	Very Good	14	21
	Excellent	5	8
Prices of Promotional Tour Packages by STA	Poor	22	33
	Average	21	32
	Good	20	30
	Very Good	3	4
Government Tourism Policies & Innovations	Poor	6	9
	Average	11	17
	Good	13	20
	Very Good	18	27
	Excellent	18	27
Digital Marketing & Communications Technology	Poor	11	17
	Average	12	18
	Good	23	35
	Very Good	17	26
	Excellent	3	4
Government Monitoring of Tourists' Destinations	Poor	11	17
	Average	26	39
	Good	17	26
	Very Good	9	14
	Excellent	3	4
Training & Capacity Building Programs Provided by STA to Tourism Personnel	Poor	12	18
	Average	14	21
	Good	14	21
	Very Good	13	20
	Excellent	13	20
Total		**66**	**100**

Table (8): Pillar 2-The Governance of Tourism Sector

Variable	Ranking	Freq.	(%)
Establish new public tourism entities	Poor	11	17
	Average	5	8
	Good	16	24
	Very Good	19	29
	Excellent	15	23
Involving tourism stakeholders in tourism planning	Poor	15	23
	Average	18	27
	Good	19	29
	Very Good	10	15
	Excellent	4	6
Total		**66**	**100**

Table (9): Pillar 3 -Tourism Sustainability

Variable	Ranking	Freq.	%
	Poor	10	15
Government Encourages Tourism Investments	Average	14	21
	Good	16	24
	Very Good	16	24
	Excellent	10	15

Socio-Economic Development	Poor	11	17
	Average	15	23
	Good	15	23
	Very Good	17	26
	Excellent	8	12
Tourism Employment Opportunities	Poor	6	9
	Average	5	8
	Good	9	14
	Very Good	21	32
	Excellent	25	38
Total		**66**	**100**

Table (10): Pillar 4- Experts' Panel Evaluations of SAUDI ARABIA Main Tourism Leisure Attractions

Variable	**Ranking**	**Freq.**	**(%)**
Variety of Accommodations	Poor	10	20
	Average	8	16
	Good	10	20
	Very Good	19	39
	Excellent	2	4
Accommodations Prices	Poor	27	55
	Average	10	20
	Good	9	18
	Very Good	3	6
Climate Attractiveness	Poor	5	10
	Average	7	14
	Good	14	29
	Very Good	17	35
	Excellent	6	12
Natural Wonders	Poor	5	10
	Average	3	6
	Good	14	29
	Very Good	14	29
	Excellent	13	26
Events& Festivals	Poor	4	8
	Average	8	16
	Good	8	16
	Very Good	16	33
	Excellent	13	26
Attractive Tourists Handicrafts	Poor	12	24
	Average	9	18
	Good	16	33
	Very Good	10	20
	Excellent	2	4
Food Variety	Poor	4	8
	Average	3	6
	Good	6	12
	Very Good	19	39
	Excellent	17	35
Total	**49**	**100**	

4.3. Discussion

The paper addressed significant questions on how to raise tourism competitiveness indicators in emerging destinations and especially for destinations typically reknown for religious tourism. The contributions of Azzopardi, & others (2017); Crouch (2007 & 2010); Dwyer, & Kim, C. (2004); Hudson, Ritchie (2004); Cook and Taylor (2018) highlighted the most significant of these factors. Our analysis of the secondary data on the key performance indicators of tourism competitiveness based on the fourteen core elements of tourism competitiveness included in the World Economic Index of Travel and Tourism (TTCI) (WEF, 2019) reveals three levels of tourism performances in Saudi Arabia. This analysis has supplemented our findings from the literature review in a way to construct the theoretical framework to conduct the field study. It helped to add the pillars of (1) destination management, (2) marketing, (3) governance, and (4) tourism attractors being the cornerstones of promoting tourism in emerging tourists' destinations.

The study assumed in the first hypothesis that respondents will agree with the outcomes of our analysis of the

TTCI tourism indicators, however, respondents' answers to the group of questions indicate that the overall respondents' answers to the TTCI classifications mostly fell under the classification of "average performing indicators" versus "low" as per our analysis of the TTCI.

Thus, their answers are not aligned with H1 as follows:

H1= Perceptions of employees on Saudi tourism competitiveness will coincide with those analyzed under the TTCI

Regarding the pillar on "Tourism Sector Governance", the results indicated that government should empower the sector with more flexible governance and structures to advance the tourism system. Besides, it should include different stakeholders in tourism planning such as business, education, and local communities. Especially, authorities should include the socio-economic aspects of tourism projects to ensure sector sustainability and viability. Thus, respondents answers to this group of questions do not support H2 and H3 as follows:

H2=Tourism sector is adequately structured and empowered

H3=The sector sustainability is ensured through tourism plans that promote the well-being of local communities

Regarding the pillar of destinations management and marketing. Employees considered them as "good" but require significant improvements. Their answers to this group of questions hence support H4 stating that:

H4=Functions of destinations management and marketing are adequately provided by the authority.

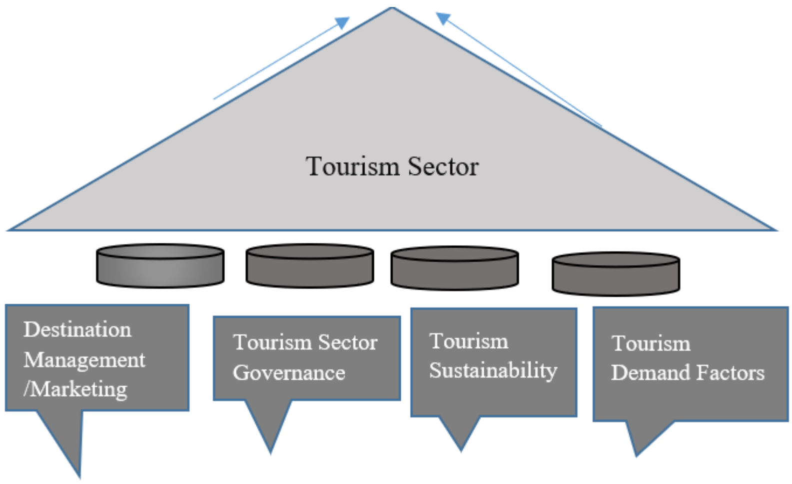
As for the fourth and last pillar pertaining to "Tourism Attractions and Demand Factors" respondents' answers considered Saudi Arabia as very fairly attractive for leisure tourism; however, government authorities should reconsider the prices of tour packages as compared to their prices in Dubai, Qatar and Egypt. Thus, their answers support H5 as follows:

H5=Tourism is enough attractive and will likely increase demand on Saudi destinations

The analysis of the competitive position of KSA in light of the fourteen core elements of the TTCI Index in the region draws the attention of scholars and policymakers to tourism performance gaps. The analysis indicates that the country "low-performance indicators" include five domains, these are:1-Price Competitiveness, 2-Environmental Sustainability, 3-Information Communication Technology (ICT), 4- Natural Resources, and 5-International Openness.

In addition, it pinpoints five "average performing indicators", these are: 6- Business Environment, 7- Human Resources, 8- Prioritization of Travel and Tourism, 9- Ground Transportation Infrastructure, and 10- Cultural Resources. Moreover, it highlights the "well performing indicators" that include the following: 11- Health & Hygiene, 12- Safety and Security, 13- Air Transport Infrastructure, and 14- Tourists Services Infrastructure. We could therefore suggest the following figure to enhance the core indicators of tourism competitiveness for this country (fig 1).

Enhancement of the Fourteen Core Elements of TTCI Tourism Competitiveness Indicators



Fig(1): The Four Pillars of Tourism Competitiveness (FPTC) Model

5. Conclusion

The study concludes that the growth of tourism in emerging economies will inevitably depend on giving priority to the destination's marketing, management, governance, and tourism sustainability.

Tourism Authority employees answers indicate -by and in large- their appropriate awareness about the major performance gaps that need quick improvements to attain a higher competitive position in the region. Besides, the TTCI analysis pinpoints that the United Arab Emirates, Qatar, and Egypt constitute the major competitive destinations in the region. The paper withdraws major lessons from the field research that provide guidelines for setting tourism policies in emerging tourists destinations. Amongst these are the necessity to incorporate the socio-economic components in the planned mega tourism projects. This would help to improve the well-being of the local communities and will ensure the sustainability of the tourism industry. Particularly, the field study highlights the drastic need to enhance the managerial and marketing capacities of personnel working in the sector. Besides, there is a need to raise the awareness of the local communities about the benefits of tourism to the economy and society. Especially, efforts should be made to ensure local citizens that tourism growth will not affect their identities . The study also indicates that however SAUDI ARABIA is considered the region's largest tourism market in terms of revenue, figures show that pilgrimages are the cornerstones of the inbound tourism demand. Moreover, strict visa regulations continue to deter the long-term growth of leisure tourism. For this reason, destinations in similar conditions in other countries should take serious measures to facilitate visa entry to open their countries .

However, the paper has shed light on factors of attractiveness for a destination reknown for religious tourism and impedements of reaching a global position in the international tourism market. It draws the attention of scholars and policy makers to undertake further research to assess the impacts of effective destinations management and marketing on advancing the competitive position of emerging destinations.

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