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Competitiveness of tourist destinations: The study of 65 key destinations for the development of regional tourism*

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Summary: 1. Introduction; 2. The concept of competitiveness; 3. Models for the evaluation of the competitiveness of tourist destinations; 4. Study of the competitiveness of 65 key destinations for the development of regional tourism — Brazil report; 5. Analysis of the results of the 'Study of competitiveness of 65 key tourist destinations for the development of regional tourism' — Brazil Report 2008 and 2009; 6. Final considerations.

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Key words: tourism competitiveness; inductors tourist destinations; regional development.

Palavras-chave: competitividade do turismo; destinos turísticos indutores; desenvolvimento regional.

Tourism has reached world importance in the economy. The competition in tourism has intensified between destinations, whether the destinations are cities, regions

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or countries. In this sense, the evaluation of the tourism competitiveness of these destinations may be helpful in planning and prioritizing actions that will benefit the industry. This article discusses the concept of competitiveness by the multidimensional view of performance, efficiency and unit analysis. Using the theoretical framework lifted, this article shows the 'Study on the competitiveness of the 65 destinations inducers of regional tourism development' prepared by the Tourism Ministry, the Brazilian Support Service to Micro and Small Enterprises (Sebrae) and Getulio Vargas Foundation (FGV), its assumptions that guided this study as well its methodological aspects. Based on this methodology, it was carried out a diagnosis of these 65 destinations selected by the Brazilian Ministry of Tourism to be inducers of tourism in their respective regions. The result of competitiveness reached by these 65 inductors destinations is presented in this article, providing a map of the level of competitiveness of tourism in Brazil.

Competitividade de destinos turísticos: estudo de 65 destinos-chave para o desenvolvimento do turismo regional

A importância que o turismo tem alcançado para a economia dos países acirrou a competição entre destinos turísticos, quer sejam cidades, regiões ou países. Nesse sentido, a avaliação da competitividade desses destinos em relação ao turismo pode colaborar decisivamente no planejamento e na priorização de ações que irão beneficiar o setor. Este artigo discute o conceito de competitividade como multidimensional e pelo ponto de vista do desempenho, da eficiência e da unidade de análise. Tendo como arcabouço o referencial teórico levantado, apresenta-se o "Estudo de competitividade dos 65 destinos indutores do desenvolvimento turístico regional" elaborado pelo Ministério do Turismo, Serviço Brasileiro de Apoio às Micro e Pequenas Empresas (Sebrae) e a Fundação Getulio Vargas (FGV), as premissas que o orientaram, assim como seus aspectos metodológicos. Com base nessa metodologia, realizou-se um diagnóstico da realidade de 65 destinos turísticos brasileiros escolhidos pelo Ministério do Turismo para serem indutores de turismo em suas respectivas regiões. O resultado da competitividade, alcançado por esses 65 destinos turísticos indutores, é apresentado neste artigo, fornecendo um mapa do nível de competitividade turística do Brasil.

1. Introduction

The importance that tourism has acquired for national economies is evidenced by the intensification of competition between tourist destinations. The choice of country, city or region as a tourist destination by tourists means more income, employment and tax revenue for the location that receives these tourists. For this reason, the measurement of the intensity of the factors which favor or inhibit tourist-related activity has become fundamental for the strategic

planning of these destinations. In other words, the evaluation of the competitiveness of destinations in tourism terms can contribute decisively to the prioritization of actions taken and the allocation of resources that will benefit the sector.

With the aim of carrying out a diagnosis of the current reality present at destinations that have an instrumental role in the development of tourism in Brazil, the Ministry of Tourism (MTur), the Brazilian Support Service for Micro and Small Companies (Sebrae) and the Getulio Vargas Foundation (FGV) have carried out a 'Study of competitiveness of 65 key destinations for the development of regional tourism.'

Taking competitiveness as a benchmark, and based on the principles of sustainability, the study aims to provide a diagnosis of the level of competitiveness, in tourism terms, of these destinations in order to provide some guidelines for planning and public policies to be implemented, while also monitoring the efficiency and effectiveness of the actions taken.

Methodology has been drawn up involving 13 different aspects, which we have called dimensions that aim to capture the key elements of competitiveness of a given tourist destination: general infrastructure, access, tourism services and equipment, tourist attractions, marketing, public policies, regional cooperation, monitoring, local economy, business capability, social aspect, environmental aspects and cultural aspects. Each dimension has been broken down into a number of variables (total of 60), in order to be able to create a snapshot of the current reality of each destination with greater precision, thus making it possible to adopt efficient measures to correct possible deficiencies in specific sectors.

The results for the destinations have been presented individually, for each destination, by technical staff from the team of the Getulio Vargas Foundation, the purpose of this being to clarify, in accordance with the methodology adopted, the level of competitiveness found at each destination, for each of the aspects analyzed. With the teams working together, proposals have been drawn up to improve the level of competitiveness of each municipality.

After carrying out research at the 65 destinations in two phases, one in 2007 and the other in 2009, it was noted that there had been an improvement in the competitiveness of these destinations. The results achieved at the 65 destinations are presented in this report, together with the analysis of the 13 dimensions of competitiveness studied.

This article is divided into six sections, including this presentation. The second section discusses the concepts of competitiveness contained in literature on the subject, emphasizing the evaluation criteria and the units of analysis

used. In the third section, proposed models by different authors are presented for the measurement of competitiveness of the tourist destinations. The fourth section discusses the 'Study of competitiveness of the 65 key destinations for the development of regional tourism' proposed by the Ministry of Tourism, Sebrae and the Getulio Vargas Foundation, while presenting the results of the competitiveness study for these destinations. In the fifth section, the results of the 13 competitive dimensions which make up the 'Study of competitiveness of the 65 key destinations for the development of regional tourism' are analyzed. The last section then deals with the final considerations raised in this article.

2. The concept of competitiveness

Competitiveness is a term that is widely used nowadays, however its significance varies in accordance with the benchmark used in the evaluation: whether it be applied to industry or services, cities, regions or countries. It is a phenomenon that can be evaluated using various methodological approaches.

Studies of competitiveness do not share the same concepts, methodological approach or standards of evaluation. There is a profusion of competitiveness concepts proposed in the area of economics, resulting in a lack of consensus in works related to this theme (Lastres and Cassiolato, 1995; Kupfer, 1992; Haguenauer, 1989; Buckley et al., 1988).

According to Farina (2003) the concept of competitiveness involves different focuses which make it difficult for the concepts to be wide-ranging, while at the same time being useful. From a competition standpoint, competitiveness is the capacity to survive and grow sustainably (making profit) in competing or new markets.

According to the law of comparative advantage, when comparing two items produced in different countries, we would have to measure the cost of production for the origin of each, calculating each input is used in production (labor, cost of capital, taxes, use of soil etc.). The producer that, taking this comparison, has the lowest production cost for the particular item, would therefore have a comparative advantage (Giordano, 1999).

Meanwhile Porter (1989) leaves the theory of comparative advantages to one side, and deals with competitive advantages. He includes other variables in addition to cost, expanding the concept of competitiveness, because he questions whether just factors such as low salaries, abundant labor and favorable exchange rates can be determined as being differentials for a particular

country. Porter (1989) suggests that the most important item for the measurement of competitiveness is productivity, seeing that with productivity it is possible to increase the individual and per capita incomes of the country, in addition to achieving better remuneration of capital employed. Another factor considered by the author is innovation, whether it be in terms of production, technology or new products.

Due to the widespread nature of the concept of the phenomenon of competitiveness, there is no single concept which is universally accepted. However, there are two points that converge in studies on this theme:

- The unit of analysis, meaning that competitiveness can be systemic (countries, regions), structural (economic sector of the company) or business-related (unit of the company);
- Evaluation of competitiveness can be based on studies of performance and/or efficiency.

These two approaches which are based on methods which measure competitiveness are presented below.

Evaluation criteria: Performance versus efficiency

Competitiveness can be evaluated according to performance and/or efficiency criteria. In an evaluation based on efficiency, the *ex-ante* concept is used, in other words measurement of the production capabilities of the companies, sectors or countries. Evaluation of competitiveness based on performance uses the *ex-post* concept, in other words the phenomenon is evaluated based on the results produced by actions already carried out in the past.

According to Haguenauer (1989), most of the texts produced associate competitiveness with industrial export performance. This concept has an *ex-post* aspect, because it evaluates the performance of a country in a competitive scenario, or in terms of international competitiveness in terms of its trade, in other words, the phenomenon is evaluated based on the results produced by actions already carried out in the past .

Competitiveness viewed from a performance perspective has three advantages: (i) simplicity in the construction of indicators (results produced in the past, *ex-post* concept); (ii) the indicators are wide-ranging (exchange rate, trade, production, capital); (iii) these indicators can be used internationally such as, for example, macroeconomics (Haguenauer, 1989; Durand and Gior-

no, 1987). However, Fajnzylberg (1988) criticizes this method of evaluation, because in the short term, currency depreciation and other economic devices can be used to artificially improve the performance of companies or countries. Kupfer (1992) and Haguenauer (1989) also question the indicators of performance, considering that if a company is competitive it will grow in the market, so that to know whether or not a company is competitive, one needs to see whether or not it produces good results.

On the other hand, when we take the competitiveness concepts from the point of view of structural characteristics (infrastructure etc.), such as the capacity to beat competitors in terms of efficiency, we have a potential concept, in other words, considered as *ex-ante*, which generally is restricted to production conditions. The indicators within this concept are variable, such as: price, quality, technology, salaries, productivity and other production conditions (Haguenauer, 1989).

The author proposes the following concept of competitiveness:

> Competitiveness can be defined as the capacity of an industry (or company) to produce merchandise according to specific quality standards, required by particular markets, using a level of resources that is equal to or less than those prevailing in similar industries in the rest of the world, over a certain period of time. (ibid, p. 13)

Technology is highlighted by Freeman (2004) as one of the most important aspects related to competitiveness, when evaluating efficiency. This same view is shared by Frjnzylber (1988) for whom the greater a country's capacity to incorporate new technology into its production systems, the greater is its competitiveness. In this regard, Fagerberg et al. (2007), Nelson and Winter (1982), Rothwell (1977) and Rosemberg (1976) affirm that one of the most important factors for the differentiation of performance between companies, and industrial sectors and companies in terms of economic growth and industrial progress, is technological competitiveness.

However, Kupfer (1992) considers that the best techniques available in the market can only be known *a posteriori*, thus returning to the same dilemma as in the evaluation of performance. For this reason, Lastres and Cassiolato (1995) consider the focus on efficiency to be restrictive, because the evaluation of competitiveness is being carried out in a static manner, to the extent that the efficiency approach (and also that of performance) reflects the results of skilled accumulated and strategies adopted over a particular period of time in the past, by companies or countries.

The concept of competitiveness has evolved over time and other important concepts have been added to the notion of competitiveness, such as social well-being (Fagerberg, 1988; Fajnzylber, 1988; Jones and Teece, 1988) or sustainability (Fem, 2007). In addition to this, competitive aspects have been used for different units of analysis, such as product, company, industrial sector or nation (Sources Filho, 1995; Buckley et al., 1988).

Unit of analysis: Systemic, structural and organizational competitiveness

Santos (2006) broadens the concept of competitiveness, establishing three spheres of classification: (i) systemic, linked to the economic, social, legal-institutional and production structure of a country, and its insertion into global trade; (ii) structural, related to specific characteristics of the economic segment of the activity (industrial sector), and (iii) business related, referring to the specific resources of each organization (personnel, finance, technology etc.).

From this perspective, Coutinho (1994) considers macroeconomic factors which permit commercial and political interaction between companies, as being the focus of systemic competitiveness, these being: macroeconomic order, infrastructure, the political-institutional system and the socioeconomic characteristics of the national markets. All these are specific in each national context, and should be explicitly considered in terms of public or private sector initiatives for the encouragement of competition.

With regard to the structural sphere, Santos (2006) argues that this should be analyzed in accordance with the different areas of activity and their specific aspects. In this sense, Lall (2001) believes that the majority of analyses of competitiveness use an approach that has a focus on structural factors which will affect economic performance over the long term, such as innovation, productivity and skills — factors to which Fagerberg (1996) adds technology, all of which have a positive impact on the competitiveness of a given country.

At the business related level, Dwyer and Kim (2003) emphasize that any organization must provide products and services for which customers are willing to pay. In a system of free enterprise, over the long term, competitiveness is measured by the capacity of an organization to stay in business and plan the investment of its organizations, in such a way as to obtain a return on investment and guarantee employment for the future.

Also from the business related aspect, Vasconcelos and Cyrino (2000) consider that competitiveness should be analyzed as deriving from the envi-

ronment outside the organization, derived from the structure of the business area in which it operates, the degree of competition that exists and market positioning, as well as the factors originating from within companies. This approach proposes that the competitiveness of a given company is heavily linked to the structural environment that they have (internal), as well as the environment into which they are inserted (external).

Despite companies having a favorable external environment, Olsen et al. (2008) argue that organizations also need to create valuable goods and services with a high degree of productivity from a microeconomics perspective. In this way, the level of competitiveness and productivity of a given economy is determined by a combination of micro and macroeconomic environments.

In order to gain a better knowledge of the spheres for the evaluation of competitiveness, the focus of a given analysis to be carried out should be clearly defined, because the same object being analyzed can be studied from different perspectives. In evaluating countries and their characteristics, a systemic method is used, in other words the analysis of the system of interaction which that country has, and which permits it to interact with other countries, in this way being able to verify the interaction of various national systems. When we look at the capacity of a particular system in each country, a structural focus is used, and finally, when we look at companies' ability to compete, we will be using a business-related focus for such an analysis.

In this section, we have carried out a review of the literature demonstrating that the concept of competitiveness that has been developed is multidimensional. Also, we have discussed the concept from the point of view of its evaluation (performance, efficiency) and its unit of analysis (systemic, structural, organizational). In the next section, we will show various models for the measuring of the competitiveness of tourist destinations.

3. Models for the evaluation of the competitiveness of tourist destinations

A look at recent literature shows that there have been a series of presentations of studies and international experiences with regard to competitiveness in the tourism industry.

Gooroochurn and Sugiyarto (2004) have drawn up a model for the evaluation of the competitiveness of tourist destinations whose units of analysis were: (i) prices; (ii) economic openness; (iii) technological developments;

(iv) structure; (v) human development in tourism; (vi) social development; (vii) the environment, and (viii) human resources.

Crouch and Ritchie (1999) have developed a conceptual model of competitiveness for destinations, based on four factors: (i) qualification factors (or situational conditions); (ii) management of the destination; (iii) attractions and key resources, and (iv) support factors and resources.

Melián-Gonzáles and García-Falcón (2003) have also drawn up a model for the evaluation of competitiveness, and have applied it empirically to a segment of fishing tourism in the Canary Islands, in Spain. According to these authors, the resources of tourist destinations can be described as consisting of natural resources (beaches and mountains) or cultural resources (museums, festivals, local traditions etc.).

Enright and Newton (2004) have formulated a quantitative model for the measuring of competitiveness based on the identification of significant competitors, the attractions and the businesses related to the sector which affect the competitiveness of the destinations.

Kozak and Remmington (1999) have established that the competitiveness of tourist destinations is based on a combination of two fundamental factors: (i) primary factors, such as climate, ecology, culture, architectural heritage, and (ii) specific factors of the tourist sector, such as hotels, transport means and entertainment.

Johns and Mattsson (2005) have established the competitiveness of destinations in accordance with quantitative performance, based on the number of tourist arrivals, and their revenues (*ex-post* concept), but also admit that there is a need to evaluate qualitative aspects or aspects of efficiency (*ex-ante* concept), seeing that these will determine the performance of the destination.

The World Economic Forum published a significant study on competitiveness in 2007, based on secondary data from various international organisms and a survey among leaders and executives present at the forum. Based on these figures, a ranking of competitiveness in tourism terms was drawn up, in which 130 countries were classified according to their level of competitiveness.

The competitiveness index developed by the World Economic Forum was based on models structured on thirteen key elements: (i) public policies and regulations; (ii) environmental legislation; (iii) safety; (iv) health and hygiene; (v) priority given to the tourism sector; (vi) air transport infrastructure; (vii) ground transport infrastructure; (viii) tourism infrastructure; (ix) communications infrastructure; (x) prices in the tourism sector; (xi) human resources; (xii) national perception of tourism; and (xiii) natural and cultural resources. These elements were then grouped into three areas: (i) regulatory

model; (ii) business environment and infrastructure; and (iii) natural, cultural and human resources.

In view of this complex diversity of competitiveness evaluation models, it is clear that the phenomenon is multidimensional and that its measurement depends on the choice of the variables analyzed and the geographic base (regions or countries) (Gooroochurn and Sugiyarto, 2004).

Based on these competitiveness evaluation models from different authors, the complex model proposed at the World Economic Forum 2007 was arrived at, which was used to draw up a ranking of countries according to their respective competitiveness in the area of tourism. It is clear, from the theoretical reference presented here, that competitiveness is a multidimensional phenomenon and its measurement depends on the variables chosen, in addition to the evaluation criteria and the unit of analysis. In the next section we present the 'Study of the competitiveness of 65 key destinations for the development of regional tourism.'

4. Study of the competitiveness of 65 key destinations for the development of regional tourism — Brazil report

One of the goals defined under the National Tourism Plan 2007/2010, for the development of tourism in Brazil, consists of the structuring of 65 tourist destinations of an international standard of quality by the end of 2010. A structure of inter-municipal tourist routes has been proposed for Brazil's various regions, based on the principles of cooperation, integration and environmental, economic, sociocultural and politico-institutional sustainability.

The identification of these key destinations was carried out by MTur based on criteria which contemplated all the units of the Federation and its capital cities, with there being a minimum of one and a maximum of five key destinations in each region. For the choice of destinations, research and evaluation studies were considered such as The International Tourist Marketing Plan — Plano Aquarela, The National Tourist Marketing Plan — Plano Cores do Brasil, as well as other studies and investment analyses carried out by the federal government, and with regard to the potentials and necessities of these destinations.

With these premises in mind, the Ministry of Tourism (MTur) and the Brazilian Service for the Support of Micro and Small Companies (Sebrae) commissioned a study from the Getulio Vargas Foundation (FGV) which establishes a system of indicators and generates an index of competitiveness for the destinations analyzed. In this way, there would be a benchmark set, with the commencement of an historic series whose objective would be to serve as

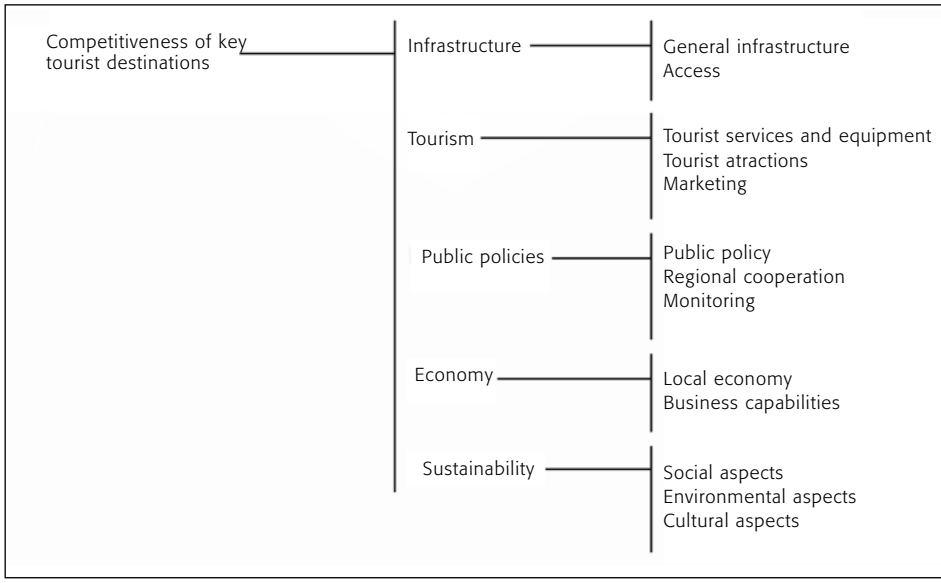
a basis of data comparison for the monitoring of these destinations over time, thereby providing guidelines for planning and initiatives by the three levels of government, for the development of regional tourism.

During the course of the theoretical-conceptual reference presented here, competitiveness was defined for this study as being: 'The growing capacity to generate business in economic activities related to the tourism sector, in a sustainable manner, providing the tourist with a positive experience' (MTur, Sebrae, FGV, 2008:32).

The concept of efficiency was chosen (*ex-ante*) for the evaluation, due to the difficulty of obtaining reliable performance figures for the different segments which affect tourism either directly or indirectly. For the unit of analysis, variables were sought both of a systemic and structural nature, in order to achieve the best possible 'snapshot' of local reality.

For the operationalization of the concept of competitiveness defined in this study, five macrodimensions were defined, subdivided, in turn, into 13 key elements, which in turn were broken down into variables, and thus into indicators so as to extract the reality of the concepts underlying the competitiveness of the destination. Figure 1 represents the macrodimensions and the dimensions of the study.

Figure 1
Dimensions and the dimensions of the study



It was sought to give priority to the most objective possible aspects in the evaluation of variables, using qualitative indices only residually. In this case, equalization was carried out with the aim of avoiding subjectivity in the evaluation.

Scoring criteria

The definition of each macrodimension and their respective dimensions, as well as the variables and questions (transformed into indicators) from which they are drawn up, resulted in the elaboration of scoring criteria. This procedure was initially carried out by specialists in each of the dimensions and subsequently validated in a combined session with the participation of technical staff from MTur, tourism departments from individual states, Sebrae, representatives of class organizations and sector professionals, and the academics involved in the construction of the index. The scoring of the variables and questions were exhibited by a group of technical staff from FGV. Thus, for the evaluation of the competitiveness of the 65 key tourist destinations, points were attributed for each question, variable and dimension, taking into account the respective contributions to the global competitiveness index.

Each variable was defined in such a way as to capture the real significance of the dimension of which is it is a part, as a function of the questions which, after scoring, led to scoring by variable, and thence to the scoring of each dimension, in accordance with the following formula:

$$\delta_i = \sum_{j=1}^{j} \left(\sum_{k=1}^{K} \left(x_{kji} + \left(\left(\sum_{m=1}^{M} z_{mkji} \right) I_{kji} \right) \right) \omega''_{kji} \right) \omega'_{ji}$$

$i = 1, 2 \ldots, 13$

Where:

Z_m = total score of the sub question m . m = 1, 2, …, M;
X_k = total score of the question k . k = 1, 2, … K;
Y_j = variable j . j = 1, 2, …, J;
I = 1 if question K has sub questions; 0, if to the contrary;
ω' = weighting attributed to variable j;
ω" = weighting attributed to question k.

This procedure permitted the identification of the relative position of each destination in each of the 13 key dimensions of competitiveness:

$$\text{Final Scoring} = \sum_{i=1}^{13} \left(\sum_{j=1}^{J} \left(\sum_{k=1}^{K} \left(x_{kji} + \left(\left(\sum_{m=1}^{M} z_{mkji} \right) I_{kji} \right) \right) \omega''_{kji} \right) \omega'_{ji} \right)$$

Where:

ω = weighting attributed to dimension i.

Collection of data

The data was collected between the months of December 2007 and February 2008 using research in the field, in which observation and a questionnaire with only objective questions was used. In all 65 destinations the researchers were monitored by representatives of Municipal Tourism Departments, as well as the respective state tourism body. Also participating in the data collection process as respondents, were representatives of the municipal public power, employees of Sebrae and Senac, as well as professional staff on teaching institutions and bodies representing the hotel, restaurant, tourist reception and travel agency sectors.

Twenty-three researchers were selected for the field research, among professionals who already had experience in tourist research and/or consultancy. These researchers, before moving into the field, received special training for 20 hours on the concepts employed in the study of each dimension, the possible difficulties likely to be encountered in the field, and strategies for checking responses.

In November 2007, a 'pilot' field research test was carried out in six towns with the aim of evaluating the data collection instrument and verifying the questions in terms of being suitable for the methodology, access to information, the time for data collection and other aspects of the research organization. The researchers spent five days collecting data *in loco* in the 65 key destinations previously defined, as shown in the map in the annex.

In addition to the data collected in the field, available data was used from official sources, whose information served to complement the database of the model and the treatment of variables which required relative adjustments for comparison purposes, such as, for example, the population of the destinations researched.

The same research was carried out in 2009, in this way beginning an historic series which will be extremely valuable for the monitoring of development and how it involves in the 65 key Brazilian destinations.

Data analysis

Analysis of the data was carried out by the setting up of a system in which the data was typed in, immediately tabulated and marked, in accordance with the specific weighting of the dimensions and variables in parameter form.

For each of the 13 dimensions, the destinations were classified on a direct scale of five levels (1-20, 21-40, 41-60, 61-80, 81-100), which did not take into account the distribution of the sample.

Publication of results

The results of the study were released in a publication entitled Brazil Report, which contained explanations about the concept utilized, methodological aspects, and details of the macrodimensions, dimensions and variables touched on, in addition to charts of the figures obtained in the dimensions in the following categories: Brazil, capitals and non-capitals.

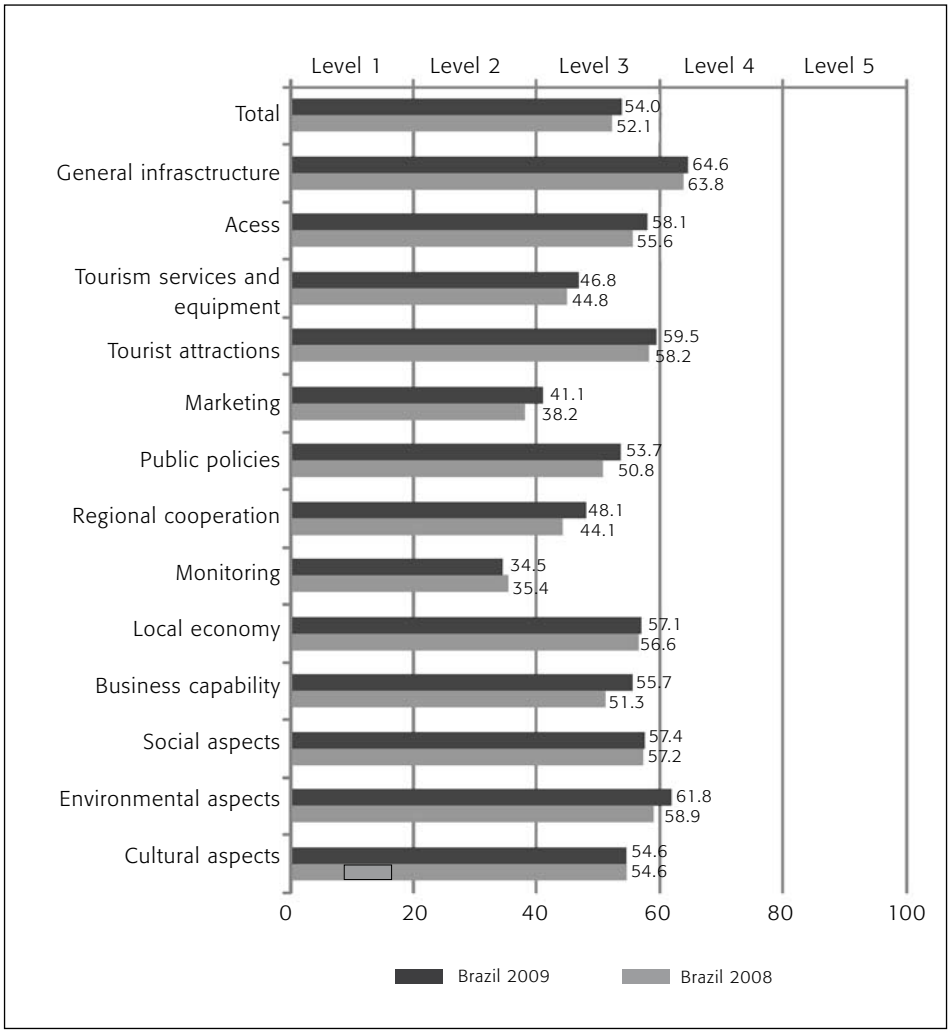
For the publication of the consolidated results, seminars were held in the 65 destinations with the objective of disseminating the concepts employed in the study, presenting the results for each destination, carrying out prioritization of the variables and the associated dynamics, and drawing up proposals for improving competitiveness.

Results

These results will serve as an instrument for strategic monitoring so that the destinations researched will be able to analyze the indicators under each of the dimensions studied and use this information for planning and developing competitive advantages. The municipalities may use these competitiveness indicators and combine efforts with the most diverse members of the tourism production chain, in the definition of targets and strategies that will make positive contributions to the competitiveness of the tourist destinations.

This section presents the 'Study of competitiveness of the 65 key tourist destinations for the development of regional tourism,' drawn up by MTur, Sebrae and FGV, the assumptions used as the guidelines for the study, as well as the methodological aspects: the definition of dimensions, point scoring, data collection, data analysis and the results achieved for the 65 key destinations. Subsequently, the results of the research will be analyzed in sequence.

Figure 2
Results: 2009/2008



5. Analysis of the results of the 'Study of competitiveness of 65 key tourist destinations for the development of regional tourism' — Brazil report 2008 and 2009

It is important to emphasize that the consolidated results in this work represent capital cities and non-capital cities, but that the Brazil Reports 2008 and 2009 present this information under two destination groups: capitals and non-

capitals. Another significant observation, with respect to the results, refers to the scoring that is presented according to dimensions and not by the macrodimensions of the study, previously defined. This is because the analysis of these dimensions better reflects the reality captured by the model and provides a greater wealth of information.

General result for Brazil (2008/52.1 points – 2009/54.0 points)

The general result of the competitiveness study reached for Brazil in the 65 key destinations indicate a modest increase of 1.9% in competitiveness, between 2008 and 2009 (from 52.1 points in 2008 to 54.0 points in 2009), under the 13 dimensions studied, thus remaining at level 3. In order to reach an international quality standard, as desired by the Ministry of Tourism and to increase the competitiveness of the key Brazilian destinations as compared to rival tourist destinations in the international market, it would be desirable for these destinations to improve their positioning on the scale defined in the study over time. This is to say that various efforts still need to be made to improve the level of competitiveness in the country's tourist sector.

Following on from this, an analysis is shown of the evolution of each one of the 30 dimensions which make up the competitiveness study of MTur, Sebrae and FGV in the years 2008 and 2009.

General infrastructure (2008/63.8 points – 2009/64.6 points) – level 4

This dimension observed the capacity to support the development of tourism in the destination, in accordance with four variables: (i) capacity to provide medical care for the tourist in the destination, (ii) urban structure in tourist areas, (iii) electricity supply, and (iv) service for the protection of the tourist.

The provision of infrastructure is understood as being a systemic dimension, as it deals with public services that come under the responsibility of the three levels of government (municipal, state and union).

This dimension reached level 4 in terms of competitiveness. Among the positive aspects analyzed, of particular note are: (i) 24-hour emergency services in the majority of destinations, and (iii) good and electricity supplies, except in cases where this service suffers from power interruptions in the high season. However, variables related to: (i) tourist safety, and (ii) urban structure of tourist

areas, are still beset with problems. The existence of special groups or protection programs for the tourist, within the military and civil police and the availability and state of urban real-estate conservation, are examples of factors which need to be improved in many destinations, particularly in non-capitals.

Access (2008/55.6 points – 2009/58.1 points) – level 3

The access dimension analyses the variables of (i) air transport access, (ii) highway access, (iii) other types of access (water and rail), and (iv) the transport system of the destination itself.

This dimension is systemic in nature, and at the same time structural, seeing that the transport sector is related to the economic sector of tourism, and is also linked to the economic structure of the country, being also considered a global activity. Tourist movement mainly takes place between a tourist dispatching 'hub' and the area that receives the tourist (the tourist destinations). For this tourist movement there is a need for long distance, medium distance and short distance transport systems. This requires a reliable combination of routes, means of transport, passenger terminals, and all the support services for these activities, the availability of which is linked to the country's national transport structure. For shorter distances, that is to say between internal and secondary destinations to the tourist destination, transport/access structure is more limited to the interurban and urban transport and that of the tourist industry itself.

The access dimension showed an improvement of 2.5 points 2008 and 2009, but still remains at level 3 in terms of competitiveness ranking. For the variable (i) air transport access, many airports are operating above their capacity in the major urban centers, while in the small municipalities the structure of these terminals is precarious; the system of (ii) passenger rail transport is incipient; and water transport (iii) is little exploited. Finally, (iv) problems related to congestion and the availability of urban bus routes that serve the main tourist attractions were also identified with respect to the transport system in the majority of destinations.

Tourist services and equipment (2008/44.8 points – 2009/46.8 points) – Level 3

For the tourist services and equipment dimension, seven variables were analyzed: (i) tourist signs; (ii) tourist information centers; (iii) space for

events; (iv) board and lodging capacity; (v) tourist receiving capacity; (vi) professional qualification, and (vii) restaurants.

We once again emphasize the use of efficiency criteria in this study, for the evaluation of competitiveness. Therefore, the installed capacity of the destination has been verified in accordance with the variables above. However, an analysis of business competitiveness cannot be considered, because it was not possible to analyze these specific resources of each organization in their respective sector (board and lodging, intermediation, food and beverage etc.). For this reason, an analysis of competitiveness was carried out of the structural competitiveness of the tourist industry of the destinations.

That directly responsible for the providing of services to tourists, the tourist equipment installed in the destinations, was found to have a competitiveness level 3, an improvement of 2.0 points over the period 2008/2009. This improvement is due to, among other factors, the increase in the number and structure of: (ii) tourist information centers, as well as the presence of (v) tourist reception companies able to provide foreign language services in the majority of the destinations evaluated. By contrast, many of the destinations still do not have (i) adequate tourist signs on routes and do not have (iii) a convention centre. With regard to (iv) board and lodging capacity, the creation of formal incentives for the prioritization of environmental issues and compliance with accessibility laws are factors which need to be developed in many destinations. In addition to this, the adoption by the destination of (vi) instructions with respect to hygiene in the preparation of food is fundamental in order to guarantee service quality.

Some actions for improvement for this dimension may include: the stimulation of activity through the provision of specific financing lines under more advantageous conditions than those made available by the traditional financial system; the provision of professional training resources by the public technical teaching network, by partner teaching institutions that provide professional training and those that have agreements with the public sector and tourist trade; agreements and partnerships between the public and private sector for the implementation/maintenance of tourist signs and tourist information centers.

Tourist attractions (2008/58.2 points – 2009/59.2 points) – level 3

The attractions were supplied as: (a) natural (elements provided by nature), (b) cultural (cultural assets and values of a material and non-material nature),

(c) scheduled events (fairs, congresses, seminars etc.) and (d) technical, scientific and artistic creations (works, installations, organizations, research activities). The analysis was therefore carried out in accordance with the following criteria: (i) degree of current use; (ii) representativeness; (iii) local acting support; (iv) state of conservation of the surrounding countryside/environment; (v) infrastructure, and (vi) access.

The attractions are what motivates tourists to travel from their usual living environment to tourist destinations. For this reason they are related to tourist activity, their competitiveness being of a structural type.

Despite the known diversity and originality of such attractions in Brazil ((ii) representativeness), the attraction dimension remained at level 3, a long way from what would be compatible with the wealth of natural and cultural resources, and the potential for events and technical/artistic creations in the country.

The existence was also observed of another type of (ii) significant attraction in the majority of key destinations. Many of these destinations have natural and cultural attractions, scheduled events and technical, scientific and artistic creations. In addition, it was observed that there was concern with regard to (iv) environmental preservation of the areas surrounding the tourist attractions, in the majority of destinations. However, there are still few destinations which have carried out studies of load capacity for these attractions — particularly natural and cultural — while of those who have carried out such studies, not all of them apply them. In addition to this, the study indicated the need for adaptations to be made (v) to attractions to cope with persons that are disabled and whose mobility is restricted.

Marketing (2008/38.2 points – 2009/41.1 points) – level 3

To gauge the competitiveness of tourist destinations under the marketing dimension, the following variables were taken into consideration: (i) marketing planning; (ii) participation at fairs and events; (iii) promotional material, and (iv) the internet website of the destination.

Marketing offers the tourist destinations the tools to communicate with their target markets. In this regard, tourism companies and public bodies responsible for the management of tourism, will be engaged in the strategies to be used to attract segments of pre-identified demand. Therefore, this deals with the measurement of structural competitiveness in the marketing dimension.

The marketing dimension was found to be at level 2 in 2008, having evolved to level 3 in 2009, remaining at the limit of these two levels. The increase in the level of competitiveness in the dimension of marketing and promotion of the destination is due, among other factors, to: the institutionalized practice of (ii) participating in fairs and events in the tourist sector, in the majority of destinations; the existence of (iii) institutional promotional materials also contributed favorably to the indices of this dimension, although these are not yet available in foreign languages. However, many destinations have still not developed: (i) a marketing plan — a variable which is of great importance in terms of the competitiveness of the destinations. Another aspect which deserves attention is the lack of tourist information on (iv) government websites, in the majority of municipalities researched.

The role of marketing has become increasingly important for tourist destinations. Therefore, players in the public and private sector in tourist regions must work together around a consistent marketing plan to increase their efforts in the sense of maintaining and improving their share of the market.

Public policies (2008/50.8 points – 2009/53.7 points) – level 3

The study of competitiveness in the tourist destinations takes into account the following variables under the public policies dimension: (i) degree of cooperation with the state government; (ii) degree of cooperation with the federal government; (iii) planning; and (iv) the existence of cooperation between the private and public sectors.

Public policies for the development of the tourist sector are drawn up by municipal, state and national governments. For this reason, the measuring of this dimension, which deals with planning and intervention implemented by different tourist bodies, has a structural competitiveness approach.

The public policies dimension was found to be at level 3, having evolved by 3.1 points between 2008 and 2009, showing progress in the public sector responsible for the development of tourism. The following points were positive in respect of this evolution: (iii) the resources deriving from parliamentary amendments, and additional direct investments on the part of (ii) state and federal governments; (iv) municipal guideline plans for the destinations researched, covering the tourism sector; (i) the existence of the presence of a local public administration body responsible for tourism on state tourism committees and as part of forums. A number of negative aspects were observed under this dimension, which could be improved: (i) inactivity in the majority of ins-

tances on the part of local government and the lack of (iv) formal planning for the tourism sector besides municipal guideline plans.

Successful tourism is based on a partnership between the various interested parties in this sector, such as governments, state or semi-state bodies, voluntary and non-profit organizations, the private sector, the hosting community and visitors. From abroad perspective, what is required is the balanced development of many facilities needed to satisfy the requirements of the visitors and meet the needs of the local population.

Regional cooperation (2008/44.1 points – 2009/48.1 points) – level 3

The process of regionalization in Brazil's tourism industry should be understood as the distribution of a geographical space in regions with diverse objectives, such as planning, management, promotion and sale integrated with tourist activity (MTur, Sebrae, FGV, 2007). In this regard, the following variables were taken into account for the purpose of gauging the competitiveness of the tourist destinations under the regional cooperation dimension: (i) governance; (ii) regional cooperation projects; (iii) itinerary planning; and (iv) promotion and support for commercial activity.

These four variables are directly related to tourist activity, and therefore should be considered as structural with regard to the competitiveness of the destination.

There was a considerable improvement of 4.0 points between 2008 and 2009 in this dimension, but still not sufficient to reach a high level of competitiveness. Of particular note was the weak participation by (i) regional governance (organization duly institutionalized and formally constituted), responsible for the coordination of initiatives in the destination, as well as the paucity of (ii) integration projects for the various players linked to the tourist chain. The variable (iii) itinerary planning showed regional itineraries drawn up with little commitment to commercial activity, needing to take the reach of the (national and international) agencies and operators more into account. Finally, the variable (iv) promotion and support for commercial activities showed that combined strategies are needed between regional municipalities and between private-sector initiatives and the public administration, in order to obtain more consistent results.

Within the environment of regional cooperation, it is understood that when promotion and sales are carried out in an integrated manner, the result is an increase in the flow of tourists. Regional cooperation provides the basis for

regional planning, which generates a better balance of comfort and facilities desired by the tourist. It also permits the modification of tourism from one region to another, opening up new areas, as the existing areas become saturated.

Monitoring (2008/35.4 points – 2009/34.5 points) – level 2

The monitoring dimension takes the following variables into consideration for the effect of competitiveness: (i) research into demand; (ii) research into supply; (iii) system of tourist statistics; (iv) measurement of the impacts of tourist activities, and (v) specific sector studies and research of the destination.

This deals with the analysis of structural competitiveness, as all the variables are directly related to the tourist industry, while (iv) the impacts of tourism are also an offshoot of systemic competitiveness, as they analyze factors related to the environment, culture and society as a whole.

This dimension obtained the worst result in terms of competitiveness, coming in at level 2, demonstrating the paucity of research and studies related to tourist activity. In this sense, the study of competitiveness indicates that there is relatively little collection of statistical information and the carrying out of market surveys ((i) research into demand and (ii) research into supply). The precarious or non-existent system of tourist statistic information of the destinations ((iii) system of tourism statistics) making it difficult for companies in the tourist destinations to manage the different aspects of the various products and better adapt to changes in the market. There is a great lack of (iv) monitoring of the impacts of tourist activity (economic, social, cultural and environmental) in the destinations, which may jeopardize the sustainability of such activity. Finally, there are few destinations that maintain (v) a specific sector for tourism studies and research, with professional staff experienced in the carrying out of research and data analysis.

The monitoring of the competitive environment is an integral part of the formulation of policy and strategy, including the need to systematically evaluate the efficiency and the impacts of the principal policies and strategies which have been previously implemented at the destinations to improve their competitiveness.

Local Economy (2008/56.1 points – 2009/57.1 points) – level 3

For the analysis of the competitiveness of the tourist destinations under the local economy dimension, the following variables were taken into account: (i)

relative participation of the private sector in the local economy; (ii) communication infrastructure; (iii) business infrastructure, and (iv) undertakings and events that provide leverage.

This is a dimension of a systemic nature in terms of the competitiveness of the destination, because it evaluates the importance of other economic activities, as a way of increasing and facilitating the development of tourism.

The key destinations recorded a level of 3 under this dimension, citing the reasonable capacity of the local economies in facilitating the flow of people in terms of business which, consequently, could awake the interest of companies in the tourism sector (aviation, hotels, events, restaurants, transport companies etc.).

The result for this dimension was positively influenced by the action of the Convention & Visitors Bureau at the destinations ((iv) undertakings and events that provide leverage) and by the existence of financial benefits for the tourism sector ((iii) business infrastructure). On the other hand, the absence of tax benefits for activities of a tourist nature on average had a negative influence on this dimension.

Business capacity (2008/51.3 points – 2009/55.7 points) – level 3

The following variables were evaluated for the purpose of gauging the competitiveness of the tourist destinations under the dimension of business capacity: (i) professional qualification; (ii) presence of national and international groups in the tourism sector; (iii) competition and entry barriers, and (iv) number of large size companies, affiliates and/or subsidiaries.

Considering the unit of analysis, only the (ii) presence of national and international groups from the tourism sector would be 'structural' in terms of competitiveness, while the other aspects are related to systemic competitiveness, pointing out that (i) professional qualification, in this instance, is not restricted to the tourism segment.

A substantial improvement was seen of 4.4 points in terms of competitiveness under this dimension, which can be attributed to: (i) professional qualification throughout the country, with the expansion of technical colleges, universities, professional teaching units under the S System (Sebrae, Sesc, Senac and Senai) and language schools; the existence of intensification of undertakings linked to tourism in the majority of the destinations. However, considerable evolution is needed in terms of increasing: (ii) the presence of national and international groups from the tourism sector in the destinations, principally in the hotel and car rental segments.

Social aspects (2008/57.2 points – 2009/57.4 points) – level 3

The following variables were analyzed for the purpose of gauging competitiveness of the tourist destinations under the social aspects dimension: (i) education; (ii) jobs generated by tourism; (iii) policy for dealing with and preventing sexual exploitation; (iv) use of tourist attractions and equipment by the population; (v) civic awareness, and (vi) awareness and participation in tourist activity.

It is considered that this dimension is eminently systemic. This is because the variables that make up the dimension are a consequence of the activity, and factors that either restrict or leverage tourism.

The social aspects dimension came in at level 3, remaining at practically the same level between the years 2008 and 2009. The factors favorable to the result of this dimension are: (iv) the use of tourist attractions and equipment by the local population and (iii) the implementation of policies to deal with the sexual exploitation of children and adolescents. However, the destinations need to pay attention to the importance of developing formal policies of: (vi) raising the awareness of the community with regard to the importance of tourist activity, as well as programs to increase the awareness of the tourist with respect to the local community. In addition to this, it is also noted that there are still few destinations where (v) there is active participation by the community in decisions related to tourism projects.

Environmental aspects (2008/58.9 points – 2009/61.8 points) – level 4

Under the environmental aspects dimension, five variables were examined: (i) environmental structure and municipal legislation; (ii) ongoing activities that are potentially polluting; (iii) public water distribution network; public network for the collection and treatment of sewage; (iv) collection and public disposal of residues, and (v) conservation units in municipal territory.

This dimension of tourism sustainability is also analyzed from the standpoint of systemic competitiveness, not being directly linked to the tourist industry, reaching 61.8 points in 2009, having involved to competitiveness level 4.

Contributing positively to the average for this environmental aspects dimension is the existence of: (v) conservation units in the majority of destinations researched, even though few of them have a related management plan,

and (iii) the existence of public services for water and sewage collection and treatment in the destinations.

However, the research identified the absence of water treatment systems for water reuse in the destinations. With regard to (iv) public destinations for residue disposal, there are still few destinations which have a garbage processing plant. The absence of: (i) a municipal environmental code in most of the destinations, also had a negative impact on the average for this dimension.

Cultural aspects (2008/54.6 points – 2009/54.6 points) – level 3

The variables evaluated under the cultural aspects dimension are as follows: (i) cultural production associated with tourism; (ii) historic and cultural heritage, and (iii) municipal structure for cultural support.

The cultural aspects dimension is linked to the sustainability of tourism, therefore falling into the category of systemic competitiveness. This dimension remained at the same level in the years 2008 and 2009, with 54.6 points, at level 3.

Contributing positively to this dimension were: (iii) the presence of local public administration bodies responsible for cultural management of the destinations, and the existence of a municipal cultural policy, in addition to projects for the implementation of tourism. Another aspect which favored this dimension was: (i) cultural production associated with tourism, present in almost all the destinations.

On a negative note, in terms of the competitiveness of the destinations was the lack of incentive programs for (ii) the maintenance or management of cultural assets.

Following the analysis of the results achieved for the 65 key regional tourism destinations under the 13 dimensions used for measuring their competitiveness in the year 2008 and 2009, we then move on to the final considerations of this article.

6. Final considerations

Studies on competitiveness do not share the same conceptualization, methodological approach or ways of evaluation. There is a profusion of concepts of competitiveness proposed in the area of economy, leading to a lack of consensus in works related to this aspect. A review of the literature reveals the

multi-dimensional nature of this concept, discussing competitiveness in light of evaluation criteria in terms of performance and efficiency, and even by unit of analysis.

Taking the theoretical benchmarks assessed and the analysis of the different models posed for the measurement of competitiveness in tourist destinations, it becomes evident that the evaluation of the competitiveness of the tourist destinations will depend on the variables chosen, which are directly related to the type of evaluation (performance or efficiency) adopted, and the benchmark unit of reference (systemic, structural and organizational).

The 'Study of competitiveness of 65 key destinations for the development of regional tourism' drawn up by MTur, Sebrae and FGV, was structured into 13 dimensions, subdivided into 60 variables guided by *ex-ante* evaluation criteria (efficiency), the units of analysis of which are of a systemic or structural nature, depending on the nature of each variable. This combination of components was the base for the construction of a model for the measurement of competitiveness of the 65 key destinations, which also included rigorous control over the collection and analysis of data, seeking to capture the reality of each of the tourist destinations as accurately as possible.

The general results achieved for the competitiveness of the 65 key destinations for the development of regional tourism indicate an intermediate level (level 3), in other words showing that these destinations have a moderate ability to generate business in economic activities related to the tourist sector, in a sustainable manner, while at the same time providing the tourist with a positive experience.

It is hoped that this study will provide a map of the level of competitiveness in the tourist industry for these tourist destinations, capable of providing guidelines for planning and public policies in the sector, assisting in the monitoring of the efficiency and effectiveness of the initiatives implemented.

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Appendix

Map listing the 65 key tourist destinations



Source: 'Study of competitiveness of the 65 key destinations of regional tourism development' conducted by Neath/Ebape — FGV, Ministry of Tourism and Sebrae.