

# **East African Tourism Destination Competitiveness: A Comparison of Uganda and Tanzania**

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## **Abstract**

Tourism is a growing sector in East African countries, being among major sources of export earnings. The sector is the major export earner in Tanzania (more than 20% of total exports) and it was the leading export earner in Uganda for the first time in the year 2014. Growth and expansion of tourism sector in East Africa necessitate the importance of having a competitive destination. Many studies on tourism destination competitiveness have been done in the world but studies on East African destination competitiveness are lacking. This study aimed at assessing destination competitiveness of East African countries specifically Tanzania and Uganda. Using self-administered questionnaires, a total of 383 and 188 questionnaires from Tanzania and Uganda, respectively, were collected through convenient sampling of tourists at major airports, hotels and tourist attractions in the two countries. The tested variables were accommodation, attractions, visitor services, transport system and food service reflecting destination competitiveness. Travel motivation was also captured to explore if tourists to the two countries differed with respect to their travel motives. A series of independent sample t-tests was used as inferential tests. Results revealed that accommodation and visitor services tend to be highly competitive in Uganda while

transport system and travel motivation competitiveness are high in Tanzania. Attractions and food service competitiveness did not differ from one country to another. The study provides practical implications to tourism ministries and institutions on exploring destinations' competitive advantages in order to compete in the international market as well as within Africa. Moreover, findings shed light on aspects the different countries need to improve in order to be similar with other East African countries as means towards having East Africa as a single tourist destination. Theoretically, the study affirms applicability of comparative, resource based, and competitive advantage theories in appraising destination competitiveness.

**Keywords:** *Tourism destination, destination competitiveness, competitiveness indicators, East Africa.*

## **1. Introduction**

Tourism has now emerged to be a global industry, with destination being at the core of tourism product, leading to an increasing competitive market place (Hallmann *et. al.*, 2012). Tourism businesses including destinations are exposed to stiff competition globally, and intensification of competitiveness among tourism destinations is one among characteristics of the modern tourism market. To survive in such an environment and be competitive in the global market, tourism destinations need to be innovative as well as continuously seek new resources of comparative advantages compared to other alternative destinations (Kresic, 2007). Such a fact has led into the importance of Tourism Destination Competitiveness (TDC), consequently, making the concept to be recurring on to both in the academia and practitioner

realms. This can be typified by the plethora of academic research (Dwyer & Kim, 2003; Pansiri, 2014; Kresic, 2007; Zehrer, Smeral, & Hallmann, 2016; Bahar & Kozak, 2007; Crouch 2011) as well as investments deployed by the World Economic Forum in preparing and reporting the annual travel including competitiveness index for different countries.

The TDC is an important concept to both suppliers and consumers of tourism services (Abreu-Novais, Ruhanen, & Arcodia, 2016). From the supplier's side, it serves in differentiating suppliers' services from their competitors as a way of luring customers to purchase their services over their competitors, while to the customers, it serves in decision-making criteria during pre-purchase stages. The two entities interested in destination competitiveness imply the concept to be of concern to multi-stakeholders and thus, the possibility of the concept being defined, operationalized, measured and used differently. Common approaches that have been used in measuring TDC include soft and hard measures. Soft measures emanate from subjective appraisal of tourism stakeholders' perceptions including travelers, while hard measures are highly objective and measured at macro levels like arrivals, expenditure and market share (Abreu-Novais *et. al.*, 2016). Soft measures of TDC that emanate from travelers seem to be superior in certain aspects including data that are derived from final consumers who are in position to indicate unbiased competitiveness (Alba & Hutchinson, 2000) thereby capturing the multidimensional aspects of TDC as well as being more current than hard measures that are derived from secondary data (Zehrer *et. al.*, 2016).

Despite presence of many studies that compared destination competitiveness (for example, Assaker *et. al.*, 2013; Bahar & Kozak, 2007; Enright & Newton, 2005), research focusing on emerging destinations in developing countries particularly Sub-Saharan African countries appear to be missing (Ayikoru, 2015). With Enright and Newton's (2005) contention that different destinations are contextually different implying different aspects of TDC to be applicable, then it is important for studies to be undertaken in different contexts apart from those focusing on other continents than Africa. This study aimed at comparing East African countries' destination competitiveness particularly focusing on Tanzania and Uganda. Soft measures of TDC were opted for due to their intrinsic advantages over hard measures.

## **2. Literature Review**

While studies on competitiveness have focused generally on examining success of goods-producing or manufacturing firms' exportations over the past few decades, studies on the service industry, including tourism have remained limited. Accordingly, very little about both service industry and tourism destinations' competitiveness has been said (Kozak, Baloglu and Bahar, 2009).

Common to concepts that are of interest to multi-stakeholders, TDC have been defined differently by diverse stakeholders (see Abreu-Novais *et. al.*, 2016 and Mazanec *et. al.*, 2007 for review on TDC definitions). The current study that utilized soft measures of TDC commonly captured using survey of travelers was that undertaken by Zehrer and colleagues (2016). Crouch (2011) in explaining advantages of soft measures or qualitative data indicates to be of relatively more value than hard or quantitative

data that are capturing more demand aspects than destination competitiveness. Crouch and Ritchie's (1999) definition of TDC was adopted and it defines TDC as destinations' ability to ensure that overall attractiveness and integrity of experiences they deliver to visitors must equal or surpass that of many alternative destinations available to potential visitors.

Since the seminal work by Crouch and Ritchie (1999) on tourism destination competitiveness, many theoretical models have been proposed and used in appraising destination competitiveness. Common theoretical models among a myriad of models are those proposed by Ritchie and Crouch (2003; 2010), Heath (2003), and Dwyer and Kim (2003). The said models and others basically utilized the concept of comparative as well as competitive advantage in charting destination competitiveness. Ritchie and Crouch's (2003; 2010) model categorized five components of destination competitiveness that include supporting factors and resources; core resources and attractions; destination management; destination policy, planning and development; and qualifying as well as amplifying determinants. Dwyer and Kim's (2003) model includes local resources, destinations management, demand conditions, and situational conditions. Unlike Ritchie and Crouch's (2003; 2010) model, Dwyer and Kim (2003) include demand as destination competitiveness is not only determined by supply factors and also situational conditions are added like any business including destinations are vulnerable to macro-environmental factors in determining their competitiveness. Heath's (2003) integrated model had similar elements with the other model with additions of strategic components.

Buhalis (2000) states that destinations are normally seen as geographical regions serving integrated services to tourists, composed of a combination of tourism products or places with distinct natural attractiveness and properties that may be appealing to tourists. A proposed tourist destination may be a country or a continent, city, town, an island or places with natural and outstanding landscapes (Kozak *et. al.*, 2009). In order to address the issue of competitiveness in the sphere of tourism, it should be noted that the tourism product represents an aggregate category offering accommodation, food as well as beverage services, entertainment, recreation, shopping and so on. Also, the tourism product is always associated with a certain destination, an aspect, which leads to the conclusion that competitiveness in the sphere of tourism spots down to competitiveness of broader or narrower perception of the tourist destination (Kunst, 2009).

Competitiveness in the tourism industry has shifted from inter-firm competitiveness to inter-destination competitiveness through impacts of globalization. However, there are no special factors relating to interpretation of determinants of destination competitiveness (Kozak *et. al.*, 2009). As this study captured destination competitiveness from consumers' perspective (see also Ritchie, Crouch, & Hudson, 2001), only determinants of destination competitiveness that can be appraised by visitors were included, specifically accommodation, attractions, accessibility and amenities reflecting the major 4As of tourism.

### **Tanzania and Uganda Tourism**

Tanzania and Uganda are two countries in East Africa. Others include Kenya, Rwanda and Burundi. Performance of East African

countries is presented in Table 1. With respect to number of tourist arrivals, Tanzania and Uganda had 1,113,000 and 1,266,000 arrivals, respectively, for 2014 with rate of change for that year over the previous one (2013) being 4.7 percent and 4.9 percent for the two countries, respectively. The market shares based on tourism receipts for Tanzania and Uganda were 6.7 percent and 3.5 percent, respectively, with the other countries in the region particularly Kenya and Rwanda having a market share of 2.2 percent and 1 percent, respectively. Given the number of tourist arrivals and tourism receipts market share, Tanzania and Uganda appear to be in the same league among the East African countries and thus, logically they can be considered as competitors.

**Table 1 Tourism Performance of East African Countries**

International Tourist arrivals (1000)									International Tourism Receipts (US\$ Million)				
Destinations	2010	2013	2014	2015*	Percent Change			Percent Share	2010	2013	2014	2015	Percent Share
					13/12	14/13	15/14	2015					2015
<b>Africa</b>	<b>50,426</b>	<b>54,693</b>	<b>55,309</b>	<b>53,466</b>	<b>4.4</b>	<b>1.1</b>	<b>-3.3</b>	<b>100</b>	<b>31,183</b>	<b>35,562</b>	<b>36,125</b>	<b>33,069</b>	<b>100</b>
Sub-Saharan Africa	30,743	33,971	34,877	35,435	3.6	2.7	1.6	66.3	21,521	25,499	25,484	24,514	74.1
Kenya	1,470	1,433	1,261	1,114	-11.5	-12	-11.7	2.1	800	881	811	723	2.2
Rwanda	504	864	926	..	6	7.2	..	..	202	294	304	318	1
Tanzania	754	1,063	1,113	..	1.9	4.7	..	..	1,255	1,880	2,010	2,231	6.7
Uganda	946	1,206	1,266	..	0.8	4.9	..	..	784	1,334	791	1,149	3.5

**Source:** World Economic Forum (2015)



Tourism economic indicators for the two countries compared in this study are presented as shown in Table 2. Such indicators further justify comparison of the two countries.

**Table 2 Tourism Economic Indicators for Tanzania and Uganda for 2014**

<b>Indicator</b>	<b>Tanzania (USD)</b>	<b>Uganda (USD)</b>
GDP: Direct Contribution	1.36 million (5.1% of total GDP)	816,964 (4.3% of total GDP)
GDP: Total Contribution	3.78 million (14.0% of GDP)	1.90 million (9.9% of GDP)
Employment: Direct Contribution	467,000 jobs (4.3% of total employment)	Supported 247,000 jobs (3.6% of total employment)
Employment: Total Contribution	12.2% of total employment (1,337,000 jobs).	8.6% of total employment (592,500 jobs).
Visitor Exports	1.54 million (21.9% of total exports)	1.05 million (26.0% of total exports)
Investment	851,988 or 9.5% of total investment	206,976 or 4.6% of total investment

**Source:** World Travel and Tourism Council (2015)

### **3. Methods**

This study aimed at comparing Tanzania and Uganda on their TDC scores from travelers' perspectives. Thus, it was necessary to obtain information from travelers to the two countries. Despite being considered more subjective (Zehrer *et. al.*, 2016), capturing destination competitiveness from travelers' perspective is common (Bahar & Kozak, 2007; Kozak & Rimmington, 1999). Gooroochurn and Sugiyarto (2005) indicate one of the advantages of capturing destination competitiveness using tourist survey as ability of such data to capture intrinsic characteristics of a destination that are important to the consumer. Data used in this study were derived from a big study conveniently collected from travelers at main tourist points like airports, hotels and attractions using a structured questionnaire. Items of interest for this study related to competitive elements such as attractions, accommodations, accessibility including transportation and travel amenities. Despite the fact that Crouch and Ritchie's (1999) TDC elements being widely used included destination management and policy issues on top of the elements captured in this study, the two elements were not included in the study because respondents who were visitors were unlikely to be aware of such elements. The items were framed in a five point Likert scale with 1 indicating not important/poor, 5 indicating very important/excellent and 3 denoted for neutral. Four hundred and 200 questionnaires were handed to travelers in Tanzania and Uganda, respectively. Out of those, 383 and 188 questionnaires, respectively, for Tanzania and Uganda were dully filled as well as used in the analyses. Using the Statistical Package for Social Sciences (SPSS), both descriptive and comparative inferential analyses were employed. Descriptive

analyses were performed to appraise each respondent's demographic and travel profile. Then Chi-square test was performed to determine statistical differences between respondents' profiles from the two countries. A series of independent sample t-tests were performed on scores for the two countries to determine significant differences between them.

#### **4. Results**

Demographic characteristics of the two sub-samples (Uganda and Tanzania) are presented as indicated in Table 3. Relatively, more questionnaires were collected from Tanzania (n=383) than Uganda (n=188). Chi-square tests were performed to explore any statistical differences in the respondents' characteristics between the two countries. For Tanzania, male respondents were significantly more than females, while for Uganda, it was the opposite. On comparing age groups of the respondents from the two countries, results indicated those visiting Uganda were of a younger age group, particularly between 18 and 34 years. On comparing the duration of stay, respondents from Uganda significantly stayed longer than those from Tanzania. Respondents from Uganda appeared to be relatively more educated than those from Tanzania.

**Table 3: Demographic Characteristics of the Sub-sample**

Variable	Frequency	Percent	Sub-sample Frequency		X <sup>2</sup> (sig.)
			Tanzania	Uganda	
Data source	383	67.1			NA
Tanzania	188	32.9			
Uganda					
Gender					31.034***
Male	241	42.2	193[163]	48[78]	
Female	291	51.0	167[197]	124[94]	
Age					24.555***
18-34	269	47.1	159[183]	110[86]	
35-44	183	32.0	148[125]	35[58]	
45-59	72	12.6	48[49]	24[23]	
60+	25	4.4	19[17]	6[8]	
Duration of stay					50.332***
1 week	144	25.2	121[97]	23[47]	
1-2 weeks	200	35.0	135[134]	65[65]	
2-3 weeks	107	18.7	73[72]	34[35]	
4 weeks and more	93	16.3	37[62]	56[30]	
Education level					50.228***
High school	146	25.6	127[99]	19[46]	
Bachelors	198	34.7	117[135]	81[62]	
Master PhD	126	22.1	93[86]	33[40]	
	67	11.7	30[45]	37[21]	

Competitiveness of the two countries based on accommodation is presented in Table 4. Results indicated only one differed significantly with Ugandan staff being more competent than their Tanzanian counterparts.

**Table 4: Accommodation Competitiveness**

Accommodation competitiveness item	Data Source	Mean	Standard Deviation	t-value
Location of the accommodation facility	Tanzania	3.70	1.282	.608
	Uganda	3.64	1.002	
Competence and quality of services provided by staff	Tanzania	3.76	1.213	-4.222***
	Uganda	4.13	.794	
Facilities provided	Tanzania	3.83	1.119	-.419
	Uganda	3.87	.983	
Value for money of accommodation	Tanzania	3.88	3.564	-.923
	Uganda	4.14	.953	
Your overall rating of accommodation services	Tanzania	3.92	1.150	.259
	Uganda	3.90	.958	

Results comparing the two countries with respect to attractions are presented in Table 5. Results indicated that Tanzania significantly scored higher than Uganda on favourable climate/weather and having varieties of tourism activities.

**Table 5: Attraction Competitiveness**

Attraction competitive item	Data Source	Mean	Standard Deviation	t-value
Competence and quality of services provided by staff	Tanzania	3.89	1.168	.434
	Uganda	3.85	.878	
Facilities provided	Tanzania	3.77	1.130	.994
	Uganda	3.68	.953	
Value for money of attraction/activities	Tanzania	3.76	1.220	-.350
	Uganda	3.79	.978	
Your overall rating of attractions/activities	Tanzania	4.07	2.877	.084
	Uganda	4.05	.837	
Favourable weather/ climate	Tanzania	4.16	.844	6.722***
	Uganda	3.61	.970	
Unique tourism resources natural, historic, cultural	Tanzania	4.34	.864	-.123
	Uganda	4.34	.597	
Variety of activities	Tanzania	3.77	1.034	6.520***
	Uganda	3.17	.986	

Table 6 presents independent sample t-test results comparing competitiveness of the two countries on transportation aspects. The results indicated that Tanzania significantly fared well on transportation with 6 out of 10 items being significantly higher than Ugandan scores.

**Table 6: Transport system competitiveness**

Transport competitive item	Data Source	Mean	Standard Deviation	t-value
Availability of quality transport services	Tanzania	3.49	1.166	-.303
	Uganda	3.52	1.048	
Time spent to get to intended destination	Tanzania	3.47	1.197	4.973***
	Uganda	2.85	1.398	
Helpfulness/friendliness of transport drivers/operators	Tanzania	3.76	1.178	.024
	Uganda	3.75	1.228	
Quality of transport infrastructure	Tanzania	3.33	1.457	7.856***
	Uganda	2.32	1.330	
Safety level (speed, attitude of drivers)	Tanzania	3.74	1.262	8.262***
	Uganda	2.71	1.308	
Value for money of transport services	Tanzania	3.62	1.255	1.073
	Uganda	3.51	.916	
Experience at the entry point (airport visa section, border post/immigration)	Tanzania	3.57	1.310	-.423
	Uganda	3.62	1.150	
Your overall rating of transport services	Tanzania	3.66	1.220	4.301***
	Uganda	3.21	1.054	
Easy access	Tanzania	4.18	.897	7.445***
	Uganda	3.56	.966	
Smooth travel to and from	Tanzania	4.12	.853	5.882***
	Uganda	3.63	.996	

Tourism being a service-based industry, it was important to appraise visitors’ perceptions on tourist related services. The t-test results comparing the two countries on visitor services are presented in Table 7. The results indicated the presence of significant differences between the countries with some aspects for Tanzania scored higher and for some Uganda scored higher.

**Table 7: Visitor Service Competitiveness**

Visitor service competitive item	Data Source	Mean	Standard Deviation	t-value
Competence and quality knowledge of guides/services providers	Tanzania	3.70	1.198	4.133***
	Uganda	4.12	1.011	
The quality of services provided by staff	Tanzania	3.78	1.210	-2.184**
	Uganda	3.99	.970	
The information commentary provided	Tanzania	3.75	1.191	.357
	Uganda	3.71	1.004	
Value for money of visitor services/tour operators	Tanzania	3.69	1.247	.162
	Uganda	3.67	1.053	
Your overall rating of tour operators/service providers	Tanzania	3.91	1.154	2.484**
	Uganda	3.66	1.018	
Useful information about the destination before travel	Tanzania	4.13	.891	-.065
	Uganda	4.13	.799	
Friendliness and hospitality of the local people	Tanzania	4.34	.793	.121
	Uganda	4.33	.726	
	Tanzania	4.14	.866	4.338***



<b>Visitor service competitive item</b>	<b>Data Source</b>	<b>Mean</b>	<b>Standard Deviation</b>	<b>t-value</b>
Quality of services/amenities at the destination	Uganda	3.80	.831	
Competitive prices relative to competitor destinations	Tanzania	4.00	.966	-.413
	Uganda	4.04	.815	
Safety and security of the destination	Tanzania	4.27	.907	-3.029**
	Uganda	4.51	.750	
Supporting service such as currency exchange	Tanzania	4.01	.907	4.255***
	Uganda	3.66	.912	
User friendly guidance/information	Tanzania	4.03	.883	3.63***
	Uganda	3.74	.797	
Ensure safety and security	Tanzania	4.25	.915	.530
	Uganda	4.20	.819	
Pleasant interaction/communication with local people	Tanzania	4.03	.943	-2.880**
	Uganda	4.26	.711	
Pleasant interaction/communication with service personnel	Tanzania	4.00	.977	-.654
	Uganda	4.06	.871	

## **5. Discussion and Conclusion**

Recall, the aim of this study was to compare tourism destination competitiveness of two countries in East Africa, Tanzania and Uganda, because they have similar macro-indicators for tourism as well as they are in the same region. Results of independent sample t-tests indicated that the two countries differed significantly on some aspects related to the 4As of tourism that are part and parcel

of destination competitiveness determinants. For accommodation, Tanzania scored higher than Uganda by visitors indicating service providers in Tanzanian accommodation to be of higher quality than Uganda. With respect to climate/weather and variety of activities under the broad dimension of attraction, Tanzania significantly scored higher than Uganda on the two aspects. On means of accessing the destination and logistical attributes, Tanzania scored significantly higher than Uganda. On amenities, both countries had certain aspects that were significantly higher than the other one.

Theoretically, the findings offer further support to available tourism destination competitiveness (Ritchie & Crouch, 2003; 2010) because they affirm utility of the dimensions of TDC. Practically, the results offer implications to Destination Management Organizations (DMOs) as well as public sectors responsible in facilitating development of tourism infrastructures in the destinations. To DMOs, findings provide a clue on specific aspects that scored higher and thus, can be emphasized during promotion of the destinations. Public entities like central and local governments can use results in creating a better business environment for tourism private organizations to set up as well as upgrade accommodation services for the aspect to be highly competitive. For Uganda that scored relatively low in means of accessing the destination, the governments (central and local) should find means to upgrade their infrastructures so as to make it greatly competitive. Albeit not emanating from the study findings, logic can be used to extend possible causes of some aspects of TDC in the two countries being low; since tourism industry is multi-faceted in terms of requiring multiple providers and multiple

stakeholders from public and private realms. Rafts in Public-Private-Partnerships (PPPs) are likely to be among the main factors. If concrete tourism PPPs were present in the two countries, then each of the entity could reinforce efforts of the other to propel the industry.

Certainly, this study had its own limitations that give room for further studies on the topic. The fact that this study compared only two countries put a limitation in generalization, at least to the other East African countries. With TDC being liable for multiple interpretations by different stakeholders, this study that captured only visitors' perception is an intrinsic limitation of the study.

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