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Abstract

The paper aims at evaluating destination competitiveness of one the world's leading tourism countries from a stakeholders' perspective. A survey questionnaire has been submitted to 550 tourism stakeholders from a number of outstanding Italian destinations. Destination competitiveness was analysed at national level, as well as according to type, size and geographic localization of the destinations. Empirical analysis shows that tourism policy, destination management and general infrastructures are the weakest features of the Italian tourism system. They contribute to explain the gap that has emerged between Italy and its main competitors in the last two decades. Unexploited tourism potentials have been found in smaller and inland destinations and in the less developed southern part of the country.

Keywords

Destination Competitiveness

Stakeholders' perspective

Tourism policy and planning

Destination Management

Italy

1. Introduction

The impressive growth in tourism flows worldwide in the last three decades, despite now dramatically altered and ceased by the COVID-19 pandemic (Fotiadis, Polyzos and Huan, 2020), has progressively intensified the competition among tourism destinations, with this competition being expected to be even higher when the pandemic will be “over” and national and international travellers will start to travel again. Destinations concentrate resources, investments and attention on those attributes that are likely to have the greatest beneficial impact on destination competitiveness (DC) (Crouch, 2011). Fostering DC has become a key challenge for a number of countries and a major area of tourism research, with more than one hundred articles published in the last 20 years (Cronjé and du Plessis, 2020).

Several conceptual model of DC have been developed (Bordas, 1994; De Keyser and Vanhove, 1994; Crouch and Ritchie, 1999; Hassan, 2000; Heath, 2002; Dwyer and Kim, 2003). Even if they thoroughly analyse the concept of DC, they lack of predictive capacity. Some research studies have generally investigated the relative importance of attributes of DC (Dwyer et al., 2004; Enright and Newton, 2005; Hong, 2009; Bornhorst, Ritchie, and Sheehan, 2010; Crouch, 2011; Goffi and Cucculelli, 2014). These studies group such attributes into main categories and analyse their relative importance. However, they are not aimed at explaining the determinants of DC. Some studies used a descriptive approach to examining published material, including academic literature, technical reports, and several data sources available, such as tourist arrivals, receipts, accommodation capacity (Faulkner, Opperman, Fredline, 1999; Azzopardi and Nash, 2015; Todd, Leask, and Fyall, 2015; Ayikoru, 2015; Andrades and Dimanche, 2017).

Another part of literature is aimed at investigating relationship among DC and its predictors using secondary data from a large number of countries worldwide (Gooroochurn and Sugiyarto, 2005; Mazanec, Wöber, and Zins, 2007; Assaf and Josiassen, 2012; Assaker, Esposito Vinzi, and O’Connor, 2011; Assaker et al., 2013; Cvelbar et al., 2015). However, as argued by Crouch (2010), the use of secondary data does not allow to capture the multidimensionality of the DC concept.

As claimed by Gomezelj & Mihalič (2008), in an ever more competitive tourism market, the key issue for a destination is to analyse its competitive position in order to improve overall DC. A large group of research studies have sought to identify DC weaknesses and strengths of countries, large regions within countries, or specific destinations through surveys on tourists or relevant tourism stakeholders. The most useful results in terms of managerial implication at destination level were obtained when using this approach. To this end, this paper aims at evaluating the competitiveness of one the world's leading tourism countries from a stakeholders' perspective.

In 2019, with almost 600 million tourists, the top ten ranked countries worldwide received 40% of the international tourist arrivals and accounted for almost 50% of total tourism receipts (UNWTO, 2021) (see Table 1). France was the most visited destination by international tourists (89 million), followed by Spain (84 million), United States (79 million), China (66 million) and Italy (65 million).

Table 1

Here

Within the framework of this competitive tourism destination market, Italy was selected as a case study facing several competitiveness challenges and unexploited potential (Goffi and Cucculelli, 2018). The OECD (2011, p.14) pointed out that several constraints limited Italian DC, such as the lower rank of the tourism sector in the policy agenda, the uncertain brand positioning at country level, and the fragmented promotional activity; it stressed the need "to develop new visitor services, reinvent and rejuvenate tourism products and foster innovation". In 2019, Italy was the 5th most visited country worldwide and international tourism receipts reached 50 billion US$ (UNWTO, 2021). The World Travel & Tourism Council showed that Italy ranked 5th worldwide as tourism contribution to GDP (232.9bn EUR, 13.0% of the GDP) and that the contribution of tourism to employment was 3.476 million jobs (14.9% of total employment) (WTTC, 2020).

Despite the extensive literature that has focused on analysed DC of countries or large regions within countries (see Table 2), some observed shortcomings are outlined.

First, previous studies aimed at analysing DC of specific countries required respondents to evaluate attributes of DC at national level (Sirše and Mihalič, 1999; Kim and Dwyer, 2003; Enright and Newton, 2004; Dwyer, Livaic and Mellor, 2003; Gomezelj and Mihalič, 2008; Chens, Sok and Sok, 2008; Dwyer et al., 2012; Dwyer et al., 2014). Tourism is a local phenomenon, because tourists use services and facilities in the places they visit. Survey at national level may result in an inaccurate and incomplete evaluation of the various attributes of DC, thus not providing adequate guidance on effective policies to strengthen the whole tourism system. Studies based on specific destinations within countries can provide a more realistic picture of DC. In the present study, 370 outstanding tourism destinations were chosen as applied cases and, afterwards, data were aggregated to analyse DC at national level.

Second, in order to determine the factors in which countries are more or less competitive previous studies analysed the findings at country level. Tourism specificities should be taken into account and incorporated in the study when carrying out analyses at national level. In this paper, the selection process has been targeted to comply with the heterogeneity of the Italian tourism system. Thus, a further analysis has been performed to investigate if significant differences exist among:

i. destinations in the Centre-North and South regions;
ii. smaller and larger destinations;
iii. coastal and inland destinations.

Third, previous quantitative studies based on stakeholders' perspective covered only a limited sample of respondents (from 70 to 270 stakeholders for each country). In this study, 550 tourism stakeholders, as private and public tourism managers, have been interviewed.

Fourth, the first applied studies aimed at evaluating DC at country or regional level dated back almost two decades ago (Sirše and Mihalič, 1999; Kim and Dwyer, 2003; Dwyer, Livaic and Mellor, 2003; Hudson, Ritchie and Timur, 2004; Enright and Newton, 2004). Since then, a number of studies have appeared in the leading tourism journals; especially in recent years there has been an increased interest and consequent research output. By contrast, there has been a paucity of evidence from countries that capture the largest share of tourist flows worldwide.

This study aims at filling such gaps by focusing on Italy through a quantitative survey on a large number of stakeholders from several outstanding destinations, and by analysing DC at national level, as well as according to type, size and geographic localization of the destinations.

The paper is structured as follows. In the second section, a theoretical overview is provided. In the third section, methodological considerations are reported. The fourth section discusses the results. In this final section, some concluding remarks are given.

2. Evaluating tourism destination competitiveness

DC was defined as “the ability of a destination to maintain its market position and share and/or to improve upon them through time” (d’Hartserre, 2000, p.23). DC involves a multiplicity of activities related to “creating and integrating value-added products to sustain resources while maintaining market position relative to other competitors” (Hassan, 2000, p.239). Significant attention has been given to the concept of tourism competitiveness, considered as an effort of achievement of long-term profitability (Buhalis, 2000). Such definitions lack any reference to environmental and sociocultural impacts of tourism. Müller (1994) advocated the need to focus on long-term local economic prosperity and preservation of natural and historical assets: a competitive destination should satisfy visitors’ needs, enhance residents’ well-being, and preserve its natural and cultural capital. Ritchie and Crouch (2003, p.2) defined DC as “the ability to increase tourism expenditure, to increasingly attract visitors while providing them with satisfying, memorable experiences, and to do so in a profitable way, while enhancing the wellbeing of destination residents and preserving the natural capital of the destination for future generations.”

The first conceptual model of DC, Crouch and Ritchie (1999), identified 36 key attributes summarized into five categories, and it was further refined and extended in Ritchie and Crouch (2000, 2003). Being conceived as strictly conceptual, the model lacked the capacity to meet the growing need for evaluating the competitiveness of specific destinations. This model has stimulated further studies that gradually shed light on the concept of DC. Dwyer and Kim (2003) operationalized the model of Ritchie and Crouch (2000) and recognised new key factors as “demand” and “situational conditions”. Dwyer and Kim’s (2003) model was applied to analyse DC at country level. A set of almost 80 indicators was submitted to tourism stakeholders to evaluate DC in South Korea and Australia (Kim and Dwyer, 2003). The model was subsequently applied in several studies (Gomezelj & Mihalič, 2008; Chens, Sok and Sok, 2008; Armenski et al., 2012; Bagaric and Žitinic, 2013; Mulec and Wise, 2013; Dwyer et al., 2014; Chen et al., 2016) to evaluate DC of countries or large regions within countries. The first model of this kind was developed by Sirše and Mihalič (1999), who proposed a set of indicators for evaluating the competitive position of Slovenian tourism. This was the first attempt of evaluating DC at country level through stakeholders’ surveys. Enright and Newton (2004) developed a set of indicators of DC, including 37 attributes related to business environment, and 15 attributes related to destination attractiveness; the novelty of this model was the introduction of business-related attributes that were previously ignored. Two conceptual models were developed by Heath (2002) and Hassan (2000). The first model encompassed the main elements of DC and displayed them in the form of a house, with the “foundations” of a competitive destination, the “cement” (such as stakeholders’ involvement and collaboration), and the "building blocks" related to management and marketing. The Hassan's (2000) model recognized the relevance of environmental sustainability, as one of the four main determinants of DC.

There is an abundant literature aimed at analysing DC of countries and large regions within countries adopting quantitative or qualitative approaches through surveys on tourists or relevant tourism stakeholders. They were reviewed in this paper. A review process was undertaken to summarize published papers aimed at evaluating the competitiveness of specific destinations in the last two decades. Following Yang, Khoo-Lattimore, and Arcodia (2017) and Chon and Zoltan (2019), a search was conducted in seven main journal databases – Scopus, Web of Science, EBSCO Host, ProQuest, Science Direct (Elsevier), Emerald, Sage– to ensure comprehensiveness. The process ended in March 2020. The following eligibility criteria were used for inclusion: papers published in peer-reviewed journals; written in English-language; focused on specific countries or regions within countries; based on quantitative or qualitative methods. The following papers were excluded from the analysis: papers aimed at analysing the competitiveness of single destinations within countries; papers based on secondary data sources; descriptive articles not relying on surveys. The papers identified from the seven databases were screened to eliminate duplicates (multiple papers from the same dataset).

Finally, 31 papers published between 1999 to 2019 were included in the subsequent analysis. The growing popularity of the topic in DC research is evident, as two thirds of the papers (n=22) concentrated in the last eight years (2012-2019). They covered all the continents, being concentrated in Europe and Asia. Nine papers were focused on the countries created from the breakup of Yugoslavia (Serbia, Slovenia and Croatia) and two on other European countries, seven on Asian countries, three on Middle Eastern countries, two on North and three on Latin American nations, three on Australia, and one on an African country.

In the sample, quantitative studies accounted for the majority (n=27), while qualitative studies (n=4) only accounted for 13% of published papers. Among quantitative articles, almost two thirds (n=15) were based on stakeholders' perspective, one third (n=10) on tourists'/potential tourists' perspective, and two papers used both demand and supply side perspective. Following Dwyer and Kim (2003), almost half of the quantitative articles (n=13) used descriptive statistics (means and standard deviations). As in Enright and Newton (2004), IPA was applied in 6 papers. The remaining quantitative papers used data reduction techniques (PCA, n=3), or techniques to test the relationships among constructs such as SEM (n=2) and regressions (n=3). Concerning qualitative studies, 2 qualitative papers applied semi-structured interviews, 2 articles applied in-depth interviews.

Work aimed at evaluating DC of countries through tourism stakeholders' judgment has not been limited to studies published in academic journals. "The Travel & Tourism Competitiveness Report" was first published in 2007 by the World Economic Forum, and it ranked almost 150 countries worldwide, according to several sub-indexes encompassed by over a dozen of main pillars and a general index. Despite presenting some limitations (Crouch, 2007) due to its non-academic nature (such as the construction of the indexes, the representativeness of the sample size, the weights of the variables, the interpretative differences from stakeholders from different countries), it can represent a useful tool for an initial assessment of DC at country level, which needs to be more thoroughly investigated through ad-hoc surveys.

According to the "WEF Travel & Tourism Competitiveness Report" (WEF, 2019), Italy is in a strong competitive position in terms of "natural resources" (7th out of 140 countries), "cultural resources" (4th), and "tourist service infrastructure" (10th); it is in a weak competitive position in terms of "prioritization of Travel & Tourism" (63rd), "safety and security" (69th), "human resources and labour market" (67th), and environmental sustainability (64th); it is in a very weak competitive position in terms of "price competitiveness" (129th) and "business environment" (110th). Such contradictions and weaknesses make Italy, among the group of world leading tourism countries, an interesting case study on DC.

As widely known, the ability of any destination to be competitive and maintain markets share largely depends on the adaptation and resilience to demand global conditions, and on the changes in the demand structure (Altinay and Kozak, 2021) and in the travelling habits (Del Chiappa, Bregoli, and Atzeni, 2021). Safety and security have been identified as key factors that influence DC (Ritchie and Crouch, 2003). The COVID-19 pandemic has extremely intensified their relevance (Al-Saad et al., 2022; Wen et al, 2020). More broadly, it has prompted the academia and the tourism industry to devote their attention on how public health crises force to look DC through a new lens (de Paula Aguiar-Barbosa, Chim-Miki, & Kozak, 2021). It has expanded the array of actors involved in the complex phenomenon of DC; specifically, the central role assumed by health authorities has become more evident (Altinay and Kozak, 2021). Moreover, the COVID-19 pandemic has resulted in an increasing interest in mountain tourism, second-home tourism, and outdoor tourism (Seraphin & Dosquet, 2020). This has favoured outdoor and under-crowed tourism attractions/destinations (e.g. Del Chiappa, Bregoli & Atzeni, 2021), as well as sustainable travel practices (He & Farris, 2020, Jones and Comfort, 2020). Such phenomena have provided further demand-side insights about the need to revisit the magnitude by which different factors can shape DC. Xu, McKercher and Ho (2021) have advanced the idea that DC in the post pandemic era will be, to a certain extent, impacted by tourists' perceptions of a destination's crisis preparedness and sensitivity.

3. Methodology

As in most of the applied studies analysed in Table 2, this study developed a quantitative approach based on stakeholders' perspective, and used descriptive statistics to elaborate the results. Questions may be raised about who the more appropriate target is to evaluate aspects of DC. Despite tourists can easily evaluate the typical attributes of destination attractiveness, such as tourism attractors or services, "they are less likely to know about, and hence to evaluate, those factors that underlie and influence the competitive production of those services, especially because of their status as visitors" (Enright and Newton 2004, p.781). As argued by Gomezelj & Mihalič, (2008) and Enright and Newton (2004), this makes tourism stakeholders, as industry practitioners and public managers, a preferred target to evaluate DC issues, as they are the more knowledgeable population about factors behind destination attractiveness. Such population has been chosen because it was necessary "to survey individuals who could respond to questions on management efficiency and tourism attractors" (Gomezelj & Mihalič, 2008, p.298). As claimed by Enright and Newton (2004), they are able to represent, to a certain extent, the tourists' perspective, given their experience and knowledge in the field.

The destinations surveyed were awarded with prestigious national and international certifications, such as, "Blue flags", "Blue sails", "Orange flags" and "The most beautiful villages in Italy". In each destination, the survey has been submitted to a private and a public stakeholder, namely the responsible of the local Hotel Association and the responsible of the Public Tourism Office. The mean values for each attributes was calculated when both the private and public stakeholders answered the survey. Most of the quantitative studies in Table 2 were alternatively based on the Ritchie and Crouch (2003) set of factors of DC (Dragićević et al., 2012; Drakulić Kovačević et al., 2018; Wong, 2017), or on the Dwyer and Kim (2003) set of indicators (Gomezelj & Mihalič, 2008; Armenski et al., 2012; Mulec and Wise, 2013; Dwyer et al., 2014; Chen et al., 2016). The attributes selected in this study were based on both models, further adapted and tailored towards the Italian context (Cucculelli and Goffi, 2016; Goffi and Cucculelli 2019), as no universal and optimal set of competitiveness attributes exists for every destination (Gomezelj & Mihalič, 2008).

The questionnaire required respondents to rate for each attribute the competitiveness of their destination against competing destinations on a 5-point Likert scale (namely: 1 = very low competitive, 2 = low competitive, 3 = quite competitive, 4 = competitive, 5 = very competitive), as "specific tourism destinations are not competitive or uncompetitive in the abstract, but versus competing destinations" (Enright and Newton, 2004, p.781).

Mean values and standard deviations were determined for each variable. The existence of differences for each attribute of DC between destinations in the Centre-North and in the South of the country, smaller and larger destinations, coastal and inland destinations was analysed by a series of *t* tests.

4. Discussion of findings

4.1 Tourism competitiveness at national level by destination macro-attributes

As shown in Figure 1, "tourism services" and "core resources and key attractors", together with "conditioning and supporting factors" and "demand factor" received the highest rating among the seven macro-attributes of DC.

Figure 1

Here

Core resources and key attractors are the crucial components of a destination appeal (Crouch and Ritchie, 1999), whereas tourism services are the main facilities used by tourists (accommodation, food and other tourism services) and they affect tourist experience (Heath, 2002).

As can be seen in Table 3, among the items comprised by the first macro-attribute, "natural resources" (4.12) and "gastronomy" (4.09) received the highest rating, followed by "artistic and architectural features", "historical and archaeological sites", "green areas", and "events" (around 3.5). This is not surprising considering the enormous richness of Italian natural, historical and cultural resources, as well as the quality and great variety of its gastronomic products.

Table 3

Here

Italy is not only blessed with outstanding natural resources, but also with a unique historical heritage[1]. With 55 sites inscribed on the list, Italy recorded the most "UNESCO World Heritage Sites" worldwide (UNESCO, 2021). "The great attractiveness of Italy is not simply based on its history and culture, but on the variety of tourism products that the country offers." (Formica and Uysal, 1999, p.324). Most of foreign tourists selected Italy as their travel destination for "art and monuments" and for "food", which are considered as an integral part of the Italian cultural heritage and of the so-called "Made in Italy" (Becheri, Micera, & Morvillo, 2018). Indeed, gastronomy is one of the primary motivations for visiting Italy, and the amount of foreign tourists' spending in gastronomy is significant (Trunfio, Petruzzellis and Nigro (2006). In Italy, the attributes "food, cuisine, pasta and wine" were ranked as the first features that US-based travel intermediaries connected to the country image, and they gained a significantly higher score than its main competitors (Baloglu and Mangaloglu, 2001). The potential of gastronomy[2] as a tool for creating a strong competitive advantage in tourism is not adequately exploited in Italy (Presenza and Del Chiappa, 2013).

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[1] Italy boasts with 8,962 km of coastline (Istat, 2016a), 19.1% of Italian surface is covered with national parks covering the (an area of 14,651 square km), with a total amount of 57,774 square km (3,765 municipalities) covered by Natura 2000 sites, with 27 protected marine areas (Ministry for Environment, Land and Sea Protection of Italy, 2014). The historical heritage is made of thousands of historic sites, old villages and towns, historical churches, 282 archaeological parks and 536 monumental complexes (Istat, 2016b). It counts on 4,158 museums and galleries (1.7 museums every 100 square km, about one museum every 12 thousand inhabitants); one every three Italian municipalities hosts at least one museum or similar institution. In 2017, the threshold of 50 million visitors was exceeded in public cultural and historic sites (+10% compared to 2016), and the visits have grown of a further 5% in 2018, reaching the record number of 55 million visitors (Ministry of Cultural Heritage and Activities, 2019).

[2] According to the most influential gastronomic guide (Michelin Guide, 2019), Italy is the second country worldwide in terms of the number of Michelin-starred restaurants (374), with 10 "three-star Michelin restaurants" (the highest award) over 49 restaurants worldwide. Italy is also one of the best country in the world for wine lovers, accounting 400 DOC wines (controlled designation of origin) and 118 IGP wines (protected geographical indication) (Ministry of Agricultural, Food and Forestry Policies, 2019).

Tourism services, in particular accommodation and food, have the important role of "facilitators", affecting the perceived quality and value of the vacation (Heath, 2002). As a confirmation of the importance of the food attribute, the item "food service quality" (4.00) received the highest rating in the macro-attribute "tourism services", followed by "quality" and "quantity of accommodations" (around 3.6). Hotel capacity in Italy, measured as the number of bed places, has expanded from 572,829 in 1956 to 2.2 million (Istat, 2011). Italy registered the highest number of tourist accommodation establishment in Europe (204,903) and, together with France, the highest number of bed places (almost 5 million, followed by UK, Spain and Germany). Nevertheless, Italy suffers from a lack of representativeness of accommodation statistics[3]. In Italy, there is a considerable number of apartments for tourists not officially registered, as a way of escaping legal obligations, especially for tax purposes (Becheri, 2010; QuiFinanza, 2019). Such uncertainty has grown with the explosion of short-term online rental platforms such as Airbnb. The item "environmental friendliness of accommodations" recorded the lowest rating (3.17). The lack of attention towards environmentally issues hinders the effort of improvement of the environmental performances in small hotels (Chan, 2010).

The "management of local tourism businesses" (2.98) received the lowest rating among the macro-attribute "conditioning and supporting factors". The average size of Italian accommodation firms is lower in terms of number of employees per firm (5.4) than the European average (8.4) (Banca d'Italia, 2018). Most of the Italian hotels are small and family-run and present several managerial gaps (Goffi, 2019). The items "use of IT by local tourism businesses" (3.32) and "level of professional skills in tourism" (3.24) were rated below average within this group of attributes. Indeed, only a small percentage of Italian hotels use more advanced functionalities in their internet sites (Baggio, Mottironi and Antonioli Corigliano, 2011) and on-line social networks to attract visitors (Milano, Baggio and Piattelli, 2011).

Among the heterogeneous macro-attribute "conditioning and supporting factors", the items "environmental quality" (4.13) and "safety" (4.22) received the highest rating. This is probably due to the composition of the sample, outstanding small and medium destinations awarded with certifications promoting green commitment.

[3] "Official statistics recorded more than 750 thousand beds in private apartments rented for tourists, but whose presence on the territory is certainly much more relevant" (Banca d'Italia, 2018, p.67). Due to normative changes occurred in the 80's, the official tourism statistics show that overnight stays in private apartments in Italy, which have grown from 1 million in the 1970 to 2 million in 1986, have collapsed to 178,333 in 1987, and they have grown to 550,679 in 2009: 1.5 million overnight stays less than 13 years before (Istat, 2011).

Among the macro-attribute “demand factor”, the items “tourists’ environmental awareness” (3.66), “respect for local values” (3.78), “interest in local heritage” (3.56), and “local products” (3.51) were rated relatively high, and showed low levels of variance. The majority of the destinations in the sample are located in hinterland and rural areas. As shown by a study in rural areas of Tuscany, such market segment is less inclined towards material consumption and waste production and it is more environmentally friendly (Patterson, Niccolucci and Bastianoni, 2007, p.754). The item “regularity of tourist flows” received the lowest rating of the group (3.06). According to Eurostat (2019b) data, 64% of the trips in Italy are concentrated from April to September (compared to the 59% in France and Spain), in particular in the months of July and August.

One of the lowest rating was given to the macro-attribute “general infrastructures” (3.27) and, within this group, to the “quality of road system” (3.09) and to the “quality of transportation” (2.8). In a Report of the European Commission (2018, p.71-72), it is argued, “The poor performance has negative effects on Italy’s economic activities. For ports, the lack of intermodal connections with the hinterland remains one of the major causes of inefficiency”; the Report also displayed the gap in the local transport and “serious shortcomings in the safety of rail infrastructure on 3000 km of local/regional lines managed by the regions”.

“Tourism policy, planning and development” (3.21) had the second lowest rating among the seven DC macro-attributes. This group covers long-term aspects of the strategic planning and development of the destination, including tourism policies, guidelines and approaches that set the framework within which the destination management can act (Crouch and Ritchie, 1999). The critical aspects are represented by “policies aimed at improving tourism education” (2.87), by the “participatory process in tourism planning” (2.79) and by the “emphasis on community empowerment” (2.80). As observed in the OECD (2011) Report on Italian Tourism, there are quality and quantity gap in the tourism education and training in Italy. Concerning the participatory process, the gap in the ability of coordination among the different governmental levels and between them and tourism stakeholders has had negative effects on the capacity of the country to fully exploit the potential of the sector (Banca d’Italia, 2018).

Strictly connected to tourism policy, the “destination management” is focused on activities involving the appeal of the key attractors such as marketing, monitoring and communication (Avila-Robinson and Wakabayashi, 2018). “Destination management” received the lowest rating (3.09) among the seven DC macro-attributes. The majority of the attributes in this group are rated under the neutral threshold (<3). The attribute "destination management organization" (2.77) had the lowest rating in the whole set of 64 attributes. According to the Italian Constitution, activities such as tourism marketing, brand promotions, tourism strategic planning are under the responsibility of the Italian Regions and Autonomous Provinces. Consequently, destination management is fragmented among a multiplicity of actors; for such reason, the changes needed to recover international tourism competitiveness are not addressed (OECD, 2011).

4.2 Results according to the type, size and geographic localization of the destinations

Among the top 50 Italian municipalities for tourist arrivals, more than half are coastal destinations: although coastal municipalities account for less than 15% of the country's total area and 34.2% of the population, they account for 56.4% of the beds places and for 53.1% of total overnight stays (Istat, 2018). Hence, a t-test on differences was computed for coastal and non-coastal municipalities. Differences in mean values are statistically significant for several attributes concerning environmental issues and practices (see Table 3), with lower mean values recorded in coastal destinations. WWF Italia (2016) titled a Report about the state of the Italian coastal environment "L'ultima spiaggia". The literal translation of the term is "the last beach", which in colloquial use means "the last chance" (i.e. the last chance to save Italian coastal environment). The Report emphasized that the Italian coastline is highly entropized and over urbanized: within 1km coastal strip over 200,000 buildings were built between 1946 and 2001, 13,500 between 2001 and 2010; within such strip, the urbanization density doubled from the 1950s to 2000, mostly due to second holiday homes. Marine-based and port activities, marine transportation (ferries and cargo), overfishing, industrial coastal settlements, solid waste, marine litter, agriculture pollutants are menacing Italian marine and coastal environment (WWF Italia, 2016). As pointed out by Vellecco and Mancino (2010, p.2218) in an applied study on three important Italian coastal destinations, public commitment towards sustainability "is judged as being inadequate or, at any rate, barely perceptible; indeed, in the majority of cases, entrepreneurs are not satisfied with measures taken by local authorities and they demand greater commitment from them". Local governments have a key role in the protection of the coastal environment and biodiversity in Italy; they should involve local stakeholders in credible, timely and generalizable projects (Ioppolo, Saija, and Salomone, 2013).

T-test also detected statistical difference between coastal and inland destinations, with higher mean values for non-coastal destinations concerning the following attributes: “cultural attractors”, “artistic and architectural features”, “value for money in accommodation and in destination tourism experience”, “tourists’ environmental awareness”, “respect for local values”, “interest in local heritage”. Similar significant statistical differences were detected between smaller and larger destinations, with higher means for smaller destinations. T-test statistic showed that not only the mean values of the attributes “nightlife” and “shopping opportunities” were higher in larger destinations, but also “tourists oriented services”, “development” and “management of local tourism businesses”. In spite of this, in smaller destinations the “value for money in destination tourism experience” is significantly higher. The tourism market is increasingly looking for authentic, differentiated and quality experiences (Domínguez-Quintero, González-Rodríguez, and Paddison, 2020; Moore et al., 2021). The strong connections with local culture, agriculture and local products grant smaller and inland Italian destinations competitive advantages that could be further exploited. Notwithstanding, small municipalities (less than 5,000 inhabitants) only accounted for 21.8% of total overnight stays in Italy, whereas 144 municipalities with more than 50,000 inhabitants accounted for almost one-third (Istat, 2018).

The t-test indicated that the competitiveness of Southern and Northern Italy destinations is significantly different concerning “natural resources”, “gastronomy”, “nightlife”, “value for money”, “quality” and “quantity of accommodations” and “residents’ hospitality”, with the South receiving higher mean values. This suggests stronger unexploited tourism potentialities in Southern regions. Southern regions represent 78% percent of the Italian coast, they host three quarters of the areas belonging to National Parks, and more than half of the archaeological sites; however, they only account for 19.7% of the total overnight stays and for 14.3% of foreigner overnight stays, respectively (Istat, 2018). Notwithstanding, most of visitors spending in Italy is concentrated in the North. There are significant unexploited opportunities in the South also due to the absence of intermediation of international operators (Trunfio, Petruzzellis, and Nigro, 2006). Large regional differences are evident between the Northern and Southern areas of Italy: such gap was defined by the OECD (2011, p.71) as a “North-South divide”.

5. Conclusion and Discussion

The paper aims at evaluating DC of one the world's leading tourism countries worldwide through stakeholders' perspective. According to a sample of 550 tourism stakeholders from 370 Italian destinations, tourism policy and planning and destination management were identified as the most critical aspects of DC.

Results show that a critical issue facing strategic planning and tourism management in Italy is the participatory process. One of the objectives of the "National Strategic Plan for Tourism" (PST) 2017-2022 (MIBACT, 2017) was to revive the collaboration between public and private tourism sector to foster DC. Nevertheless, nor the participatory process that has led to the elaboration of the PST was perceived as "participatory", neither the objectives were perceived as clear and measurable by tourism businesses (Becheri, Micera, & Morvillo, 2018). A further critical issue is related to destination marketing. The leading role in promoting the national tourist image has been attributed to ENIT-National Tourism Agency, which has suffered from long-standing management problems (it was first entrusted to an Extraordinary Commissioner for more than one year, and afterwards subject to ministerial supervision); moreover, it is undersized in terms of both human and financial resources compared to similar agencies in France and Spain (Banca d'Italia, 2018). Besides, the Italian tourism system has faced a decline in the brand appeal due to the dispersion of promotional activities among twenty Italian Regions (Trunfio, Petruzzellis, and Nigro, 2006). Italian Regions have carried out different marketing activities, promoting their own brands and tourism activities in a dissimilar way.

The above issues contribute to explain the great gap that has emerged between Italy and its direct competitors, France and Spain, in terms of international tourist arrivals (Figure 2) and international tourism receipts (Figure 3) in the last two decades.

Figure 2

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Figure 3

Here

Besides, Italy recorded a lower net occupancy rate of bedrooms in hotels (52%) than Spain (67%) and France (62%) (Eurostat, 2019a). Furthermore, the seasonal pattern in Italy is particularly pronounced (33% of the trips in Italy were concentrated in July and August, compared to the 24% in France and Spain).

Findings show that one of the weaknesses of the Italian tourism system is represented by the management of local tourism businesses. This can be explained by the prevalence of small accommodation providers in Italy. Not only the chain penetration in Italy (4.5%) is much lower than in Spain (12.1%) and France (21%) (Ribaudo, 2018), but also the hotels average size (33 rooms in Italy, 47 in Spain). Even if small tourism firms are more flexible and could be more specialised with regard to market niches (Peters and Buhalis, 2004), their main limits reside in the areas of financing and human resource management, and concern marketing and planning skills, low bargaining power with suppliers, as well as the ability in using technologic innovations (Getz, Carlsen and Morrison, 2004). The accommodation sectors in Italy has suffered from a lack of uniform standards for services[4]. There is the need of harmonisation of hotel classifications in order to ensure similar quality criteria. Moreover, there are no quality criteria for facilities and services to be fulfilled in most of the private rooms rented to tourists. Underreporting in accommodation statistics is also a relevant issue in Italy, which has resulted in uncertainties in predicting tourist flows, and it has negatively affected tourism policy formulation (Guizzardi and Bernini, 2012).

Policies aimed at improving tourism education emerged to be as one of the major concerns among respondents. Only 5% of Italian hotel managers hold a university degree, a percentage well below than Spain (31%) and France (25%) (Banca d'Italia, 2018). As stated by OECD (2011, p.136), in Italy, "The demand for higher education skills from the sector is very weak, the orientation of the courses is not sufficiently market-oriented, and tourism businesses are not playing an active role in the definition of the content of the courses."

Empirical evidence also shows that one of the weakest points is represented by the general infrastructures. According to the report "Transport in the European Union" published by the European Commission, Italy performed below EU average in all the main infrastructure quality indicators (European Commission, 2018). Heath (2002) labelled the infrastructures as "the

[4] In 2009, national minimum standards for hotel services and facilities were fixed (Gazzetta Ufficiale, 2019a). However, the new rules only applied to hotels opened or restructured from 2009 onwards. Moreover, it was left the possibility to the twenty Italian Regional governments to introduce higher levels of standard than those defined at national level. In 2014, a Law was approved that underlined the need to update the minimum standards fixed six years before (Gazzetta Ufficiale, 2019b), but the Implementing Decree has never been approved. As a result, the same number of stars in different Regions translates in different facilities and services.

enablers”, being the basis upon which a competitive destination should be established. A higher level of tourism infrastructures could be a key strategy both for regional development and for attracting tourists (Massidda and Etzo, 2012).

Our findings underscore that the great potential of thousands of small hinterland destinations spread all over the country is not adequately exploited. The problem of “over-tourism” has emerged in the main Italian tourist cities, such as Rome, Florence and Venice, when, at the same time, small destinations blessed with an incredible natural, historical and cultural heritage, are rarely visited. Destination management and marketing strategies at national level should be re-thought, especially now that in time of COVID-19 pandemic these un-crowded and small-scale tourism destination are attracting traveller’s preferences (Aiello, Bonanno and Foglia, 2020; Seraphin and Dosquet, 2020). Investments should be targeted towards effectively promoting such outstanding destinations, mostly hidden to national and international tourists.

Results also reveal that environmental issues are major concerns for Italian coastal destinations. Italy should improve planning and management tools in terms of environmental sustainability of coastal destinations (WWF Italia, 2016). Stakeholders’ involvement has been identified as fundamental for the implementation of successful environmental policies in Italy (Vellecco and Mancino, 2010). Rejuvenation policies were implemented by some Italian coastal destinations (Brau, Scorcu and Vici, 2009). In particular, sustainability has been recognized as a key issue for the rejuvenation of mature destinations in Italy (Simeoni, Cassia and Ugolini, 2019). Environmental assessment policies have been adopted by several seaside Italian destinations in order to achieve higher standards of environmental quality (Bruzzi et al., 2011), as well as well as environmental certification programmes (Pencarelli, Splendiani and Fraboni, 2016).

Moreover, findings suggest that the development of an effective framework to help the tourism sector in Southern Italian regions should be a top priority due to their unexploited potential. The low level of tourism development in the South is an opportunity for exploiting unique historical and natural resources in a sustainable way. There have been long-standing problems that hinder tourism development in Southern Italy, such as the lack of infrastructures and the large presence of organized crime (Istat, 2011). Investments in infrastructures aimed at improving internal and external accessibility are required, as well as more effective destination marketing strategies and a stronger public management of tourism (OECD, 2011).

Finally, this study has also theoretical implications for the literature on DC. It suggests an approach for assessing DC of countries that goes beyond conventional evaluation of DC attributes at national level. This study proposes a bottom-up approach that may be used when the evaluation deals with large and heterogeneous territories. In order to provide a more accurate evaluation of DC, it shifts the focus to the evaluation of DC of outstanding destinations within a country, and subsequently aggregating the results at national level. Furthermore, this paper proposes a new approach for the interpretation of the results. It suggests that when evaluating DC at national level, to cope with the complexity and heterogeneity of a country's tourism system, significant differences should be considered in order to formulate adequate strategies, such as territorial differences, and differences in the size and the type of destinations.

Although this research provided meaningful insights into the competitiveness of one of the leading tourism countries worldwide, it has limitations which future studies may attempt to address. First, the results are country specific and thus may not be generalizable. To enhance the generalisability of the model, replications of this study to other major tourism countries are encouraged. Second, Italy is a very heterogeneous country, not only from the morphological and territorial point of view, but also from the socioeconomic standpoint, and from the tourism development perspective. Therefore, regional differences might be further analysed. Future studies may analyse DC of specific Italian regions and major tourism destinations. Third, this study is conducted from stakeholders' perspective. Future studies may combine demand and supply perspectives in order to identify significant differences and achieve more general results.

This study was conducted before COVID-19 pandemic. Future research would merit to be devoted to monitor how DC will be changing based on the effectiveness of the reactive/proactive policies and destination strategies Italian tourism destinations will adopt to remain competitive in the "new normality", as reshaped by the current and still ongoing pandemic. Considering that crisis-related issues will probably gain more prominence in post-COVID-19 world (Xu et al., 2021), this type of studies would be certainly beneficial to further deepen the understanding that academics and practitioners have towards the most effective strategies that can help destinations to remain competitive despite experiencing turbulences and crises. Being carried out before the pandemic, this study does not acknowledge stakeholders' views towards the influence of public health crises on DC. It is therefore important to understand if private tourism stakeholders have realized the relevance of health-related safety issues, and the benefits of establishing strong network with relevant public stakeholders. Finally, future studies can provide a deeper understanding of the supply-side perspective of DC in time of pandemics.

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Table 1. International Tourist Arrivals and Tourism Receipts in the World's Top 10 Tourism Destinations

	International Tourism arrivals			International Tourism receipts
	2019	**2009**	**Var. % 2019/2009**	**2019**
France	89.4*	74.2	20.5	63.8
Spain	83.5	52.2	60.0	79.8
United States	79.3	54.9	44.4	214.1
China	65.7	50.9	29.1	35.8
Italy	64.5	43.2	49.3	49.6
Turkey	51.2	25.5	100.8	29.8
Mexico	45	21.5	109.3	24.6
Thailand	39.8	14.1	182.3	60.5
Germany	39.6	24.2	63.6	41.6
United Kingdom	39.4	28	40.7	52.7

Source: UNWTO (2010, 2020) *2018 (2019 data missing)

Table 2. Evaluating destination competitiveness of specific countries, published studies

Authors	Applied case	Type or research		Data source		Methodology	No. of respondents
		Quantit.	Qualit.	Stakeholders	Tourists		
Sirše and Mihalič (1999)	Slovenia	X		X		Means, SD	25 tourism experts
Kim and Dwyer (2003)	South Corea-Australia	X		X		Means, SD	162 Korean+132 Australian tourism stakeholders
Dwyer, Livaic and Mellor (2003)	Australia	X		X		Means, SD	132 tourism stakeholders
Hudson, Ritchie and Timur (2004)	Canada, Mountain Region	X		X		Means	130 tourism stakeholders
Enright and Newton (2004)	Hong Kong	X		X		IPA	183 managers of hotel, tour operators, travel agencies
Chens, Sok and Sok (2008)	Cambodia	X		X		Means, SD	70 tourism stakeholders
Gomezelj & Mihalič (2008)	Slovenia	X		X		Means, SD	118 tourism government officials and tourism managers
Kozak, Baloğlu & Bahar (2009)	Turkey	X			X	PCA	881 tourists
Pike (2011)	Australia, Sunshine Coast	X			X*	IPA	510 potential tourists
Armenski et al. (2012)	Serbia and Slovenia	X		X		Means, SD	140 Serbian+118 Slovenian stakeholders
Dragićević et al. (2012)	Serbia, Vojvodina Province	X		X		Means, SD	118 tourism stakeholders
Dwyer et al. (2012)	Slovenia	X		X		IPA	81 tourism stakeholders
Wang , Hsu, and Swanson (2012)	China	X		X		SEM	235 tourism practitioners
Mulec and Wise (2013)	Serbia, Vojvodina Region	X		X		Means, SD	113 tourism stakeholders
Bagaric and Žitinic (2013)	Croatia, Kvarner Region	X		X		Means, SD	107 tourism stakeholders
Andrades-Caldito et al. (2014)	Spain, Andalusia	X			X	SEM	4,195 tourists
Dwyer et al. (2014)	Serbia	X		X		IPA	270 tourism stakeholders
Pansiri (2014)	Botswana	X		X	X	PCA, Gap analysis	213 tourism providers / 298 tourists
Azzopardi and Nash (2015)	Malta		X	X		In-depth interviews	35 tourism experts
Chin, Haddock-Fraser and Hampton (2015)	Indonesia, Bali Province		X	X		Semi-structured interviews	23 tourism stakeholders
Correia Loureiro & Sarmento Ferreira (2015)	São Tomé and Príncipe		X	X		In-depth interviews	27 tourism stakeholders
Zhou et al. (2015)	USA, West Virginia	X			X	PCA	891 tourists
Chen et al. (2016)	Taiwan, Kinmen Island	X			X	Means, SD, PCA	577 tourists
Topolansky Barbe et al. (2016)	Uruguay, rural region	X		X	X*		76 tourism stakeholders/109 potential tourists
Aqueveque and Bianchi (2017)	Chile		X	X		Semi-structured interviews	13 tourism stakeholders
Wong (2017)	Malaysia	X			X	Regression	944 tourists
Albayrak et al. (2018)	Costa Brava (Spain) and Antalya (Turkey)	X			X	IPA	141+110 tourists
Djeri et al. (2018)	Serbia, Jablanica district	X			X	IPA	378 tourists
Drakulić Kovačević et al. (2018)	Serbia, South Banat District	X		X		Means, SD	95 tourism business owners and managers

Evren and Kozak (2018)	Turkey, Mountain Region	X	X	X	X*	Correspondence analysis/ Semi-structured interviews	12 tourism stakeholders/417 potential tourists
Reisinger, Michael and Hayes (2019)	United Arab Emirates	X			X	Regression	218 tourists

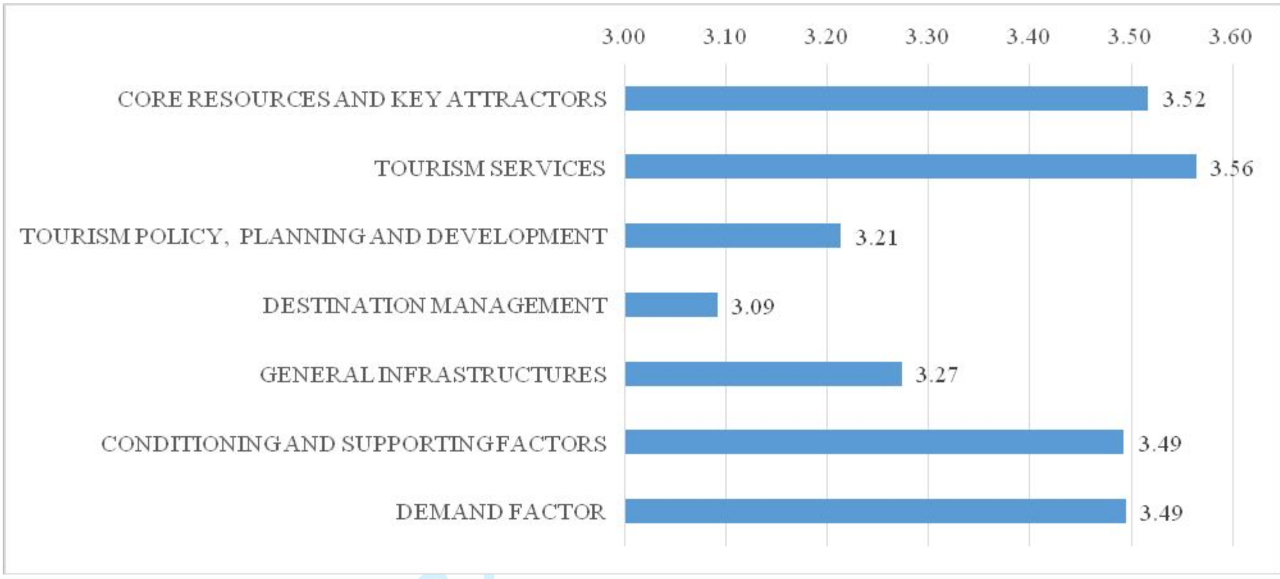
* potential tourists

Table 3. Survey Results

	Italy		Coastal destinations	Non coastal destinations		Smaller destinations	Larger destinations		Center North	South	
	mean	sd	mean	mean	mean	mean	t	mean	t	mean	t
CORE RESOURCES AND KEY ATTRACTORS											
Natural resources	4.12	0.87	4.14	4.11	4.02	4.12	(0.14)	4.27	(2.81)**	4.13	(-0.35)
Historical and archaeological sites	3.56	1.05	3.46	3.67	3.53	3.37	(3.30)**	3.61	(0.74)	3.74	(1.91)
Artistic and architectural features	3.66	1.01	3.46	3.87	3.72	3.53	(2.04)*	3.57	(-1.39)	3.76	(3.85)***
Cultural attractors	3.29	1.08	3.17	3.41	3.35	3.18	(1.66)	3.21	(-1.17)	3.37	(2.15)*
Green areas	3.65	0.98	3.49	3.82	3.76	3.56	(1.65)	3.49	(-2.59)*	3.73	(3.28)**
Leisure activities	3.23	0.95	3.22	3.24	3.24	3.24	(0.17)	3.22	(-0.16)	3.26	(0.26)
Events	3.57	1.04	3.50	3.64	3.52	3.48	(1.58)	3.63	(0.93)	3.66	(1.33)
Nightlife	3.00	1.14	3.30	2.67	2.77	3.19	(-3.07)**	3.33	(4.76)***	2.83	(-5.48)***
Gastronomy	4.09	0.86	4.02	4.15	4.00	4.10	(-0.37)	4.20	(2.21)*	4.06	(1.43)
Shopping opportunities	3.01	1.08	3.21	2.78	2.92	3.22	(-3.84)***	3.13	(1.80)	2.79	(-3.81)***
TOURISM SERVICES											
Quantity of accommodations	3.55	0.95	3.60	3.50	3.41	3.68	(-2.15)*	3.76	(3.66)***	3.47	(-0.95)
Quality of accommodations	3.65	0.83	3.61	3.69	3.55	3.70	(-1.15)	3.78	(2.63)**	3.59	(0.91)
Environmental friendliness of accommodations	3.17	0.93	3.05	3.31	3.14	3.16	(0.43)	3.22	(0.80)	3.20	(2.62)**
Food services quality	4.00	0.85	3.92	4.09	3.93	3.97	(0.42)	4.10	(1.90)	4.01	(1.87)
Tourist oriented services	3.44	0.95	3.50	3.38	3.45	3.55	(-2.23)*	3.44	(-0.06)	3.32	(-1.19)
TOURISM POLICY, PLANNING AND DEVELOPMENT											
Policies aimed at minimizing negative environmental tourism impacts	3.39	1.11	3.23	3.56	3.37	3.30	(1.18)	3.41	(0.32)	3.44	(2.76)**
Policies aimed at minimizing negative social tourism impacts	3.47	1.03	3.41	3.54	3.40	3.44	(0.24)	3.57	(1.49)	3.47	(1.15)
Policies aimed at maximising economic tourism impacts	3.61	0.96	3.63	3.58	3.58	3.71	(-1.93)	3.64	(0.61)	3.51	(-0.53)
Policies aimed at creating formal employment opportunities	3.33	0.97	3.53	3.11	3.24	3.59	(-4.96)***	3.45	(2.04)*	3.08	(-4.15)***
Policies aimed at improving tourism education	2.87	1.00	2.88	2.87	2.80	2.92	(-1.05)	2.97	(1.48)	2.80	(-0.05)
Integrated approach to tourism planning	3.16	1.05	3.08	3.23	3.11	3.16	(-0.10)	3.21	(0.86)	3.15	(1.27)
Environmentally compatible approach to tourism planning	3.42	1.13	3.26	3.60	3.48	3.42	(-0.16)	3.34	(-1.13)	3.40	(2.75)**
Political commitment to tourism	3.64	1.11	3.54	3.76	3.62	3.59	(0.56)	3.67	(0.41)	3.66	(1.85)
Collaboration among public tourism agencies	3.06	1.18	2.91	3.22	3.11	3.03	(0.18)	2.99	(-0.89)	3.06	(2.47)*
Cooperation between public and private tourism sector	3.02	1.08	2.96	3.08	3.03	3.01	(0.19)	3.01	(-0.15)	3.03	(0.98)
Participatory process in tourism planning	2.79	1.11	2.77	2.82	2.76	2.77	(0.01)	2.83	(0.54)	2.77	(0.38)
Emphasis on community empowerment	2.80	0.94	2.74	2.86	2.82	2.80	(-0.32)	2.77	(-0.47)	2.77	(1.13)
DESTINATION MANAGEMENT											
Destination communication	3.27	1.02	3.20	3.34	3.19	3.29	(-0.56)	3.38	(1.62)	3.22	(1.31)
Market segmentation	3.11	1.01	3.03	3.20	3.09	3.12	(-0.35)	3.15	(0.54)	3.08	(1.58)

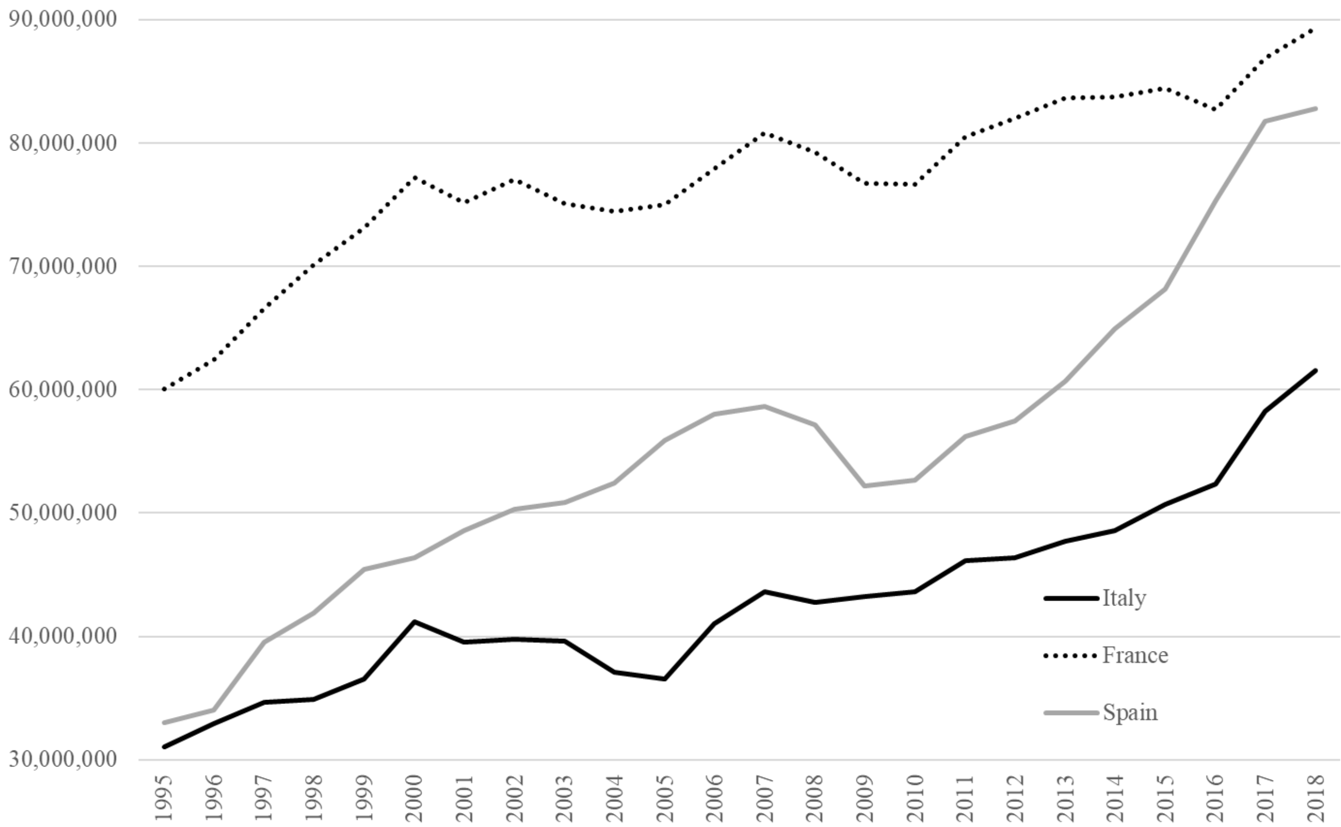
Marketing of tourism experiences	2.99	1.08	2.93	3.06	2.93	2.96	(0.60)	3.08	(1.15)	3.03	(1.09)
Destination positioning	3.38	0.98	3.38	3.38	3.36	3.43	(-0.60)	3.41	(0.51)	3.36	(0.01)
Destination Management Organization	2.77	1.13	2.70	2.85	2.78	2.79	(-0.44)	2.75	(-0.23)	2.73	(1.16)
Tourist Information Centres	3.33	1.05	3.23	3.44	3.35	3.30	(0.41)	3.31	(-0.33)	3.35	(1.84)
Tourism impacts monitoring and management	2.90	1.05	2.87	2.94	2.89	2.90	(0.07)	2.93	(0.35)	2.90	(0.61)
Stewardship of the natural environment	3.50	0.97	3.42	3.59	3.48	3.46	(0.77)	3.53	(0.39)	3.54	(1.61)
Visitor satisfaction management	2.91	1.10	2.97	2.85	2.82	3.00	(-1.66)	3.05	(1.89)	2.80	(-0.96)
Promotion of partnerships among tourism operators	2.92	1.06	2.89	2.95	2.88	2.91	(0.03)	2.97	(0.74)	2.92	(0.51)
Promotion of public-private tourism partnerships	2.91	1.04	2.90	2.93	2.88	3.00	(-1.32)	2.96	(0.62)	2.84	(0.21)
GENERAL INFRASTRUCTURES											
Quality of road system	3.09	0.93	2.97	3.22	3.12	3.02	(1.19)	3.05	(-0.67)	3.14	(2.60)**
Quality of transportation	2.80	1.01	2.80	2.81	2.83	2.85	(-0.82)	2.76	(-0.62)	2.76	(0.16)
Communication system	3.51	0.98	3.60	3.41	3.43	3.59	(-1.49)	3.62	(1.77)	3.44	(-1.89)
Medical care facilities	3.31	0.95	3.32	3.29	3.36	3.39	(-1.65)	3.23	(-1.23)	3.23	(-0.34)
Sanitation, sewage and solid waste disposal	3.64	1.01	3.55	3.74	3.69	3.64	(-0.11)	3.57	(-1.12)	3.62	(1.87)
Accessibility of facilities by disabled persons	3.29	0.94	3.24	3.35	3.37	3.32	(-0.56)	3.18	(-1.85)	3.27	(1.12)
CONDITIONING AND SUPPORTING FACTORS											
Hospitality of residents	3.63	0.98	3.63	3.62	3.40	3.59	(0.62)	3.94	(5.28)***	3.65	(-0.02)
Safety	4.22	0.87	4.11	4.34	4.21	4.16	(1.19)	4.24	(0.27)	4.28	(2.60)**
Environmental quality	4.13	0.90	4.05	4.23	4.06	4.05	(1.52)	4.23	(1.79)	4.20	(1.94)
Links with major origin markets	3.22	1.00	3.24	3.20	3.09	3.20	(0.61)	3.40	(2.79)**	3.27	(-0.38)
Accessibility of destination	3.40	0.96	3.39	3.40	3.43	3.45	(-1.06)	3.36	(-0.65)	3.34	(0.09)
Proximity to other destinations	3.80	0.97	3.91	3.68	3.83	3.92	(-2.38)*	3.75	(-0.73)	3.67	(-2.28)*
Level of professional skills in tourism	3.24	0.83	3.17	3.32	3.22	3.26	(-0.81)	3.27	(0.59)	3.18	(1.67)
Local supply of goods	3.16	0.95	3.11	3.22	3.11	3.13	(0.39)	3.24	(1.24)	3.18	(1.07)
Development of local tourism businesses	3.46	0.94	3.50	3.41	3.40	3.64	(-3.07)**	3.53	(1.24)	3.32	(-0.92)
Management of local tourism businesses	2.98	0.90	3.02	2.94	2.87	3.14	(-3.08)**	3.12	(2.45)*	2.83	(-0.85)
Use of IT by local tourism businesses	3.32	0.95	3.37	3.26	3.22	3.39	(-1.33)	3.45	(2.22)*	3.25	(-1.08)
Value for money in destination tourism experience	3.54	0.79	3.39	3.70	3.52	3.43	(2.41)*	3.57	(0.57)	3.63	(3.77)***
Value for money in accommodation	3.32	0.75	3.20	3.45	3.25	3.21	(2.46)*	3.43	(2.20)*	3.41	(3.13)**
DEMAND FACTOR											
Tourists' environmental awareness	3.66	0.88	3.45	3.89	3.73	3.57	(1.82)	3.57	(-1.70)	3.74	(4.74)***
Tourists' respect for local values	3.78	0.84	3.57	4.00	3.81	3.65	(2.67)**	3.73	(-0.90)	3.89	(5.02)***
Tourists' interest in local heritage	3.56	0.82	3.37	3.75	3.60	3.46	(1.89)	3.49	(-1.28)	3.63	(4.39)***
Tourists' interest in local products	3.51	0.86	3.45	3.58	3.51	3.53	(-0.31)	3.51	(0.03)	3.50	(1.32)
Tourists’ destination loyalty	3.41	0.90	3.45	3.37	3.38	3.49	(-1.65)	3.46	(0.81)	3.33	(-0.77)
Tourists’ awareness of destination	3.47	0.88	3.44	3.51	3.45	3.54	(-1.23)	3.51	(0.65)	3.42	(0.80)
Regularity of tourist flows	3.06	1.00	3.00	3.13	3.00	3.07	(-0.26)	3.15	(1.41)	3.04	(1.19)
Observations	376		196	178	220	180		154		181	

Figure 1. Macro attributes of destination competitiveness, mean values



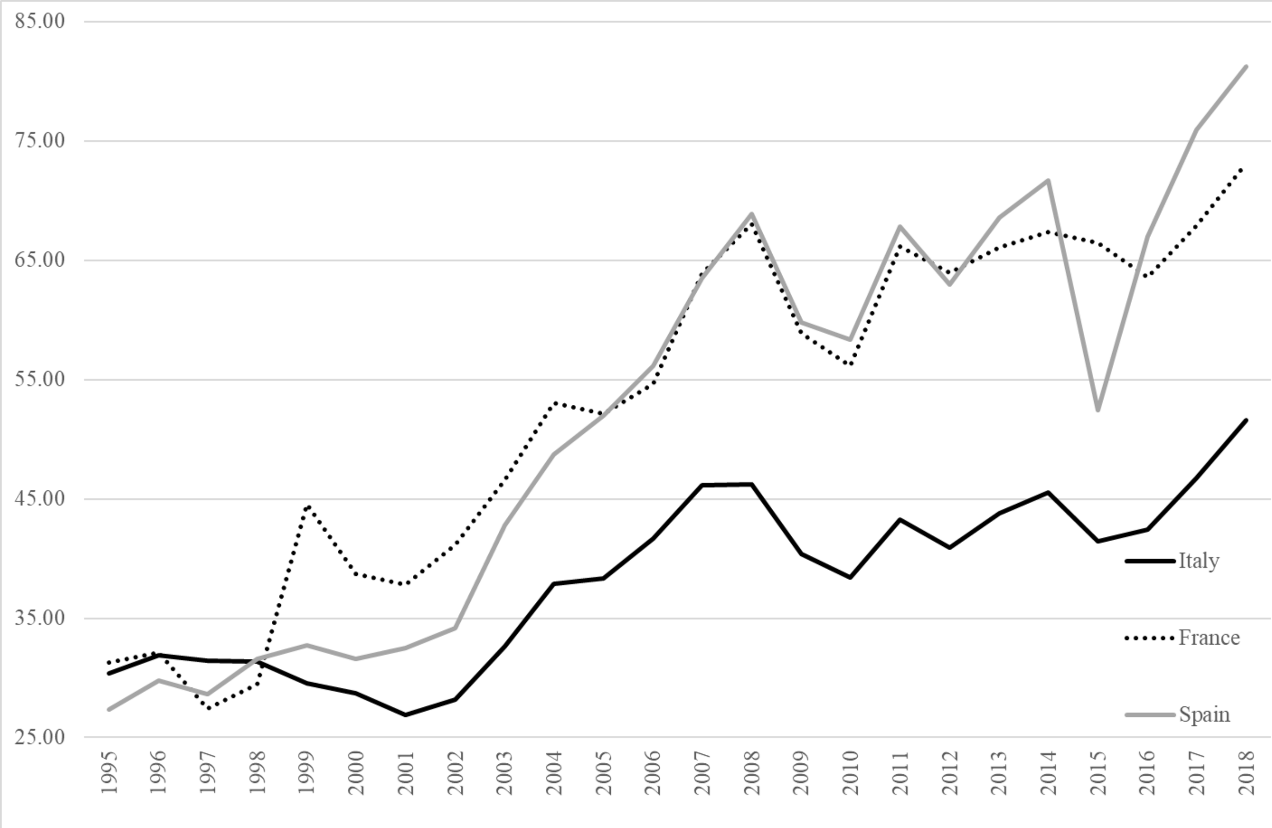
Source: Elaboration on survey data

Figure 2. International Tourist Arrivals: Italy, France and Spain (1995-2018)



Source: Elaboration on World Tourism Organization, Yearbook of Tourism Statistics, Compendium of Tourism Statistics and data files (The World Bank, 2021)

Figure 3. International Tourism Receipts: Italy, France and Spain, US billion $ (1995-2018)



Source: Elaboration on World Tourism Organization, Yearbook of Tourism Statistics, Compendium of Tourism Statistics and data files (The World Bank, 2021)

1

Your paper provides an interesting overview of literature and a good primary data set.

We express our sincere thanks to the reviewer, the comments reveal a very careful reading and helped us improve the quality and focus of our manuscript, as well as the scientific relevance of the paper. You can find below the answers to your suggestions.

2

There are few things we would like you to address.

Please check throughout for paragraphs were there may be some unsupported claims and sources which may nee to be updated with recent sources of references.

Thank you for this comment that gave us the opportunity to support our claims and update them with recent sources of references.

You can find the changes in green throughout the paper.

3

At p. 2 author/s state:

“Fostering destination competitiveness (DC) has become a key

challenge for a number of countries and a major area of tourism research.” Please provide sources of studies who have addressed this issue, which is not a new one, so to contextualise the study of such issue more broadly.

Thank you for raising this aspect. The introduction has been revised in order to better contextualize the paper as well as to make a contribution to the field.

In the new version we have summarized:

1 the conceptual models of destination competitiveness developed;

2 the research studies that have generally investigated the relative importance of attributes of destination competitiveness;

3 the studies that have used a descriptive approach;

4 the studies aimed at analysing destination competitiveness using secondary data from a large number of countries worldwide.

Then, we have argued that the most useful results in terms of managerial implication at destination level were obtained when performing surveys on tourists or relevant tourism stakeholders. To this end, this paper aims at evaluating the competitiveness of one the world's leading tourism countries from a stakeholders' perspective.

You can find the changes in blue in the introduction section.

4

We would also like to suggest you included some reflection on the implications of the on-going Covid 19 crisis in the main text and further reflection in the conclusive remarck where possible. So, for instance it would be helpful to revise the last paragraph of your conclusion where you state: "Finally, this study was conducted before COVID-19 pandemic. Future studies would merit to be devoted to monitor how DC will be changing based on the effectiveness of the reactive/proactive policies and destination strategies Italian tourism destinations will adopt to remain/become competitive in the "new normality", as reshaped by the current and still ongoing pandemic." by expanding on the relevance and importance of such studies.

We would like to thank the reviewer for the precious suggestions. We included some considerations on the implications of the on-going Covid 19 crisis at the end of the paragraph 2 Evaluating tourism destination competitiveness.

We have also included some conclusive reflections on the impact of the pandemic on destination competitiveness in the last section of the paper.

You can find the changes in blue in the conclusion section.