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Evaluating the Competitiveness of the Northern and Southern Macro-Regions of Italy

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ABSTRACT

This study uses the Crouch and Ritchie (1999) model of competitiveness to investigate/measure the competitiveness of northern and southern Italian macro-regions. Researching competitive advantages along with identifying strengths/weaknesses represent the objectives of this study. 156 responses were analysed, and findings show that northern regions tend to be more competitive than southern regions. While naturally endowed and created resources represent strengths in both regions, the competitiveness of all the determinant factors included in the tourism development, planning and policy of both tourist destinations are found to be quite inadequate. Moreover, the findings revealed that these mature destinations are experiencing the effects unleashed by a number of trends such as the development of new forms of tourism, the increasing number of tourist arrivals, the growth of the global economy and the sophistication of tourists' tastes, representing both opportunities and threats that Italian destinations need to consider when planning/developing new strategies.

Keywords: Competitiveness; Mature Tourism Regions; Italy

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Introduction

The capacity of a destination to stand out is constantly challenged by a number of forces. According to Sheldon and Abenoja (2001) and Butler (1980), the evolution of a destination consists of a sequence of different steps, including exploration, involvement, development, consolidation and stagnation. Therefore, destinations must regularly formulate new strategies to mitigate external threats, take advantage of new opportunities or respond to change in order to achieve a competitive advantage. This paper is a preliminary study that looks at tourism competitiveness by focusing on the main trends and changes occurring in micro- and macro-environments of mature destinations. Moreover, this study attempts to understand tourism differences between northern and southern macro-regions of Italy—specifically discussing how these two macro-regions are trying to preserve their competitiveness and to identify new directions. The purpose of conducting research on macro-regions of this scale is to look for what particular trends occur at the macro scale to seek direction on what aspects of competitiveness need to be assessed at micro scales. It must be noted that destinations are no longer considered to be comprised of different assets and attractions, but are seen as actual suppliers of complex tourism products (Crouch and Ritchie, 1999). While competitiveness studies address the strategic combination of valuable tourism resources and experiences offered (e.g. Armenski *et al.*, 2012; Caber *et al.*, 2012; Dwyer *et al.*, 2004; Gomezelj, 2006; Pike and Mason, 2011), Crouch (2010) notes significant changes and trends are continually occurring in micro- and macro-environments—which directly impact destination competitiveness. This suggested, researching the competitiveness of mature destinations is challenged by the development of new tourism demands and needs. Several factors involved include responsible tourists, new niche markets and increased awareness of the environmental issues. Each of these demand nascent forms of tourism development to complement existing tourism offerings such as, for example, culture, heritage, gastronomy, shopping, sport and sea/sun tourism (Trunfio *et al.*, 2006).

Italy represents an example of a mature Mediterranean destination attempting to revitalize its tourism industry. Italy is the 5th most visited country in the world, and ranks 4th in world tourism rankings among destinations showing the highest rates of tourism expenditure (Tanizawa, 2011). Subsequently, the country has a diverse variety of endowed resources in a strategic geographical location with a rich cultural heritage (including 45 UNESCO World Heritage sites), a Mediterranean climate in southern regions and rolling hills and Alpine mountains in the north (Tanizawa, 2011). While Italy remains the main competitor of Spain and France, the hospitality industry is fragmented as organizational institutions are in need of improvement and there exists limited cooperation amongst local stakeholders (Tanizawa, 2011). Today, Italy is faced with new challenging contexts, and this study will address differences between the northern and southern macro-regions as there are inherent differences across the country. Some areas are focusing efforts on the development of new tourism products, for instance the ‘Motor Valley’ in Modena, in the north, is attempting to focus on sport as a new niche form of tourism. In Modena a regional cluster arose creating a strategic agglomeration of resources and renowned expertise based on a successful

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coordination between the regional cultural and industrial heritage institutions, with the local sport motor industry, sport/events facilities, tourism organizations and the hospitality industry working together (Alberti and Giusti, 2012). Across Italy, tourism organizers/officials are working towards strategies to rejuvenate their competitiveness, calling for the need to identify and analyse the importance of particular indicators to measure competitiveness in the evolving tourism industry. This subsequent assessment of competitiveness indicators in this study is carried out by taking into account the development of new forms of tourism and the key role that stakeholders play in the co-creation of the added-value. From this, the results will explore forces and trends developing in the current micro- and macro-environments, addressing the effects they have on the tourism industry and the current competitiveness of mature destinations.

1. Destination Competitiveness

It has been noted that the competitiveness of a destination lies mainly in its capacity to preserve its position among similar markets (Armenski *et al.*, 2012; Botti *et al.*, 2009; Cracolici and Nijkamp, 2009; Croes, 2010; Domínguez *et al.*, 2015; Mazanec *et al.*, 2007; Kozak, 2004; Mulec and Wise, 2013). Broadly considering, destination competitiveness concerns numerous factors, including economic, political, psychological, social/cultural, environmental and increasingly more important, technological integration (Crouch and Ritchie, 1999; Fletcher, 2009; Gretzel and Fesenmaier, 2009; Ritchie and Crouch, 2003). Destination competitiveness has been assessed from a range of perspectives, including: reflections on performance (e.g. Botti *et al.*, 2009), price competitiveness (e.g. Dwyer *et al.*, 2000), business features (e.g. Enright and Newton, 2004), quality management (e.g. Go and Govers, 2000), marketing (e.g. Buhalis, 2000), online presence (e.g. Díaz et al., 2012), appeal and attractiveness linked to visitor perception (e.g. Cracolici and Nijkamp, 2008), the environment (e.g. Hassan, 2000) and package tours/holidays (e.g. Mangion *et al.*, 2005).
Linked to these approaches are conceptual models used to measuring destination competitiveness (e.g. De Keyser and Vanhove, 1994; Dwyer and Kim, 2003; Hassan, 2000; Ritchie and Crouch, 2003). Mulec and Wise (2013) note “each model of destination competitiveness focuses on specific determinants to identify/measure impacts and quality standards” (p. 70). For instance, and pertinent to this research, Ritchie and Crouch’s (2003) Conceptual Model of Destination Competitiveness addresses five crucial themes, which involve policy, planning/development, management, core resources/attractors and supporting factors/resources—these are further outlined below in this section. Moreover, in discussing the importance of research concerning conceptual understandings and measuring destination competitiveness Gomezelj and Mihalič (2008) mention:

> “a destination's competitiveness is a country's ability to create added value and thus increase the national wealth by managing assets and processes, attractiveness, aggressiveness and proximity, and thereby integrating these relationships within an economic and social model that takes into account a destination's natural capital and its preservation for future generations” (p. 295).

In addition to the above quote, research on destination competitiveness can play a significant role in offering management- and marketing-related recommendations to tourism stakeholders (see Mulec and Wise, 2013) or developing strategic agendas concerning viable sustainable planning policies.
Briefly referred to above, Crouch and Ritchie (1999) have identified five determinants that are important to consider when analysing destination competitiveness. The first point, 'core resources and attractors' includes attributes providing motivations for visiting a destination such as culture and history, natural landscape and climate, cultural ties, events, market ties and accommodation. Accessibility, infrastructure and knowledge are some examples of 'supporting factors and resources' which represent the structure upon which a successful tourism industry develops. The third group, 'destination management', consists of those activities aiming at managing, communicating and enhancing the resources of the first two groups (see also, Enright and Newton, 2004). The next point, 'qualifying determinants' constitutes variables such as location, safety and costs that influence directly the other factors which either limit or enhance destination competitiveness. The final determinant, 'destination policy, planning and development', has been included to this model to indicate how a destination can further develop, monitor and improve its performance (see Armenski *et al*., 2011).
Enright and Newton (2004) had challenged the universality of this model by suggesting that the indicators listed cannot be considered in the same way in every destination. Then, they analysed the extent to which the indicators contribute to make a specific destination competitive and realised that the importance covered by them was different. Further research proved that when the model was used to measure the competitiveness of different tourism destinations the results obtained by their measurement were clearly different (Enright and Newton, 2005). As a result, the identification of the relative importance of the core factors suggests that destination managers and industry researchers need to fully understand differences between destinations in order to devise the right strategies to manage and successfully develop or redevelop the destination. Thus, the complexity of the analysis of the competitiveness and the diversity and variety of resources distinguishing different destinations justifies the development of a diversified mechanism of competitiveness which makes them competitive in different ways (Gomezelj and Mihalič, 2008). All this complicates not only the comparison of the performance of different destinations as they are based on different systems of competitiveness but also the identification of competitors (Kozak and Rimmington, 1999).
The lack of a weighting system of the competitiveness led to the development of alternative models that combine differently the indicators listed in the Crouch and Ritchie (1999) conceptual model to further assess the drivers on the basis of the performance of a destination considering different perspectives (Assaf and Josiassen, 2011). A 'competitiveness monitor model' (Navickas and Malakauskaite, 2009) has been formulated with the aim of quantifying the immediate impact each indicator has on the competitiveness of a destination. This model attributes to each indicator a specific index which is usually used to measure and evaluate the micro- and macro-environment. This is to show a numeric list that can be further studied by relying on

statistics provided and quantitative methods. In addition, human and knowledge resources are often associated to the demographics indicators used to describe the trends occurring in the population of a given territory (Navickas and Malakauskaite, 2009). Also, recent research has explored the level of importance concerning the relationship between indicators of competitiveness in making a destination succeed. The results have revealed that, in well-established tourism industries, the interdependence between economy, infrastructure and environment plays an important role in stimulating tourism demand (Assaker *et al*., 2013). Such context and evidence from the literature demonstrates that relationships between indicators and other latent variables have acquired more importance in the evaluation of competitive destinations and the information provided through multidimensional analysis, and also in this study, contributes towards developing understandings and identifying indicators of competitiveness when a particular destination or sector in particular is studied (Lee and King, 2009).

2. Methods Section

Crouch and Ritchie's (1999) model of destination competitiveness is used as a referential model for this study on the northern and southern regions of Italy as many recent studies have confirmed its validity in evaluating the competitiveness of tourism destinations (e.g. Crouch, 2011; Enright and Newton, 2005; Gomezelj and Mihalič, 2008; Mazanec et al, 2007). By virtue of arguments identified by Enright and Newton (2004), who maintained that all the indicators of competitiveness listed as widely used in existing models (e.g. Crouch and Ritchie, 1999) need to be amended accordingly to measure competitiveness as relevant to the destination under analysis (see, in addition, Lee and King, 2009; Assaker *et al*., 2013; Mulec and Wise, 2013). Therefore, given this point, the most relevant indicators of competitiveness of northern and southern regions of Italy are considered here. The determinant indicators of both regions have been investigated by considering the effects created by the external environment and the development of potential factors that would enable the destinations studied to create strategic collaborations between key stakeholders. Ferreira and Costa (2014) offer a detailed scenario of the tourist trends and forms of tourism which are developing in the current global tourism context and affecting the competitiveness of destinations deemed mature. Put another way, this has confirmed the importance attributed to the exploration of the changes currently occurring in the micro- and macro-environments in this investigation to address new sustainable competitive advantages based on strengths and weaknesses.

Common in research on destination competitiveness a Likert Scale format was used ranging from 1 (slight impact) to 5 (very high impact). A scale of values, from the lowest to the highest, was provided in order to allow respondents to attribute to each trend and to each indicator a specific level of impact. It was determined that average values 3.0 or above were considered competitive. A total of 189 surveys were returned and 156 were coded for this analysis. 33 respondents abstained from completing all the questions listed in the questionnaire—questionnaires more than 15 percent uncompleted were excluded. Thus, demographic characteristics of the respondents, descriptive statistics showing the level of impact of trends and the level of competitiveness of the indicators, and the results of statistical analysis explores relationships and differences between groups of means. Table 1 presents the demographic characteristics of the 156 respondents. This research did not target just tourism and hospitality managers/practitioners and academics, but also those from different professional backgrounds (including economy, archaeology, business management, politics and environmental sciences), all involved in research, management or development of Italy's tourism industry, and/or Italian cultural heritage with the aim of exploring the level of consistency of different perspectives concerning the competitiveness of Italian regions. Participants who completed the survey were expected to have a strong working knowledge of either the northern regions or southern regions and respective tourism industries. They were local professionals with a deep understanding of local resources and policies, and of current trends and changes that could potentially impact the country. Since this was a preliminary study to determine future directions for competitiveness research respondents were expected to evaluate tourism and business indicators to provide valid judgement on the competitiveness of either the northern or southern regions. These people were chosen within a network of one of the researchers' personal connections which explains the researchers' in-depth knowledge of the sample described above. Tourists were not considered the appropriate population to address competitiveness, as previous studies demonstrated that they tend to provide a general opinion of the competitiveness of a destination based on the perceptions of the services experienced (Caber et al. 2012). Developing a sampling frame, which includes a varied population, involves respondent assistance, also referred to as snowball sampling (Wejnert & Heckathorn, 2008) was adopted in this study. Such a sampling technique allows researchers to create an entangled network of respondents. Researchers start by recruiting participants who can then provide information about their own network of connections to recruit further research participants, then the process is again repeated (see Wejnert & Heckathorn, 2008).. Then, a nonzero probability that all members of the population were selected occurred when a large number of recruitment cycles were developed.

The subsequent analysis presents the data collected from the 156 surveys. Several statistical analyses conducted using SPSS are presented below including cross-tabulations and case summaries to obtain information about demographic characteristics of respondents and about strengths and weaknesses of the destinations assessed. A Shapiro-Wilk (S-W) test was performed to check the normality of response data. As the normality assumption for the scores response was accepted, and an independent samples t-test was conducted with the intention to show differences in competitiveness across both regions. Finally, a factor analysis was then conducted to shed light on correlations between indicators of competitiveness.

Table 1
Demographic characteristics of respondents.

Sample	%	Sample	%
Sex		*Profession*	
Male	43	Economics (management, marketing, finance)	14.3
Female	57	Law, security and safety	5.2
		Hospitality and tourism	9.7
Age		Agriculture, food and natural resources	0.6
18-30	27.7	Environment	0.6
31-42	50.3	Architecture, Archeology and cultural heritage	20.1
43-54	14.8	Education	18.8
55-65	6.5	Science, technology, engineering	20.1
Over 65	0.6	Communication	5.8
		Government and public administration	4.5
Geographical distribution of the Italian respondents			
Northern regions of Italy: Emilia Romangna, Friuli-Venezia-Giulia, Liguria, Lombardia, Piemonte, Trentino-Alto-Adige, Valle d'Aosta, Veneto, Toscana			37.8
Southern regions of Italy: Sicilia, Abruzzo, Basilicata, Calabria, Campania, Molise, Puglia, Sardegna			62.2

3. Results and Analysis

3.1. Descriptive analysis

In order to evaluate the effects generated by the micro- and macro-environments on the northern and southern regions of Italy, the respondents were asked to rate the level of impact produced by the dominant trends by attributing to each one of those listed in question 3 (Appendix 1) a specific vote on a Likert Scale of values ranging from 1 (slight impact) to 5 (very high impact) where the lowest values stood for slight impact and the highest for very high impact (Appendix 1).
Exploratory analysis results shown in Table 2 suggests most trends influencing the competitiveness of mature tourism destinations are producing an impact on both northern and southern Italian regions as well. On average, scores above 3 indicates high impacts are attributed to new forms of tourism promoting the authenticity and the creativity of the place, information and communication technology development, new emerging tourism destinations, sophistication of tourists' tastes, slow food movement, increasing tourist arrivals and increased environmental awareness. The small standard deviations and marginally high means provide small coefficients of variation (CV) indicating a very limited data dispersion and comparable variations in the scores assigned to these trends—suggesting there is a certain level of agreement among respondents. Moreover, the low difference values between the mean scores show that respondents tend to consider these trends as forces producing a more than

modest impact. Contrarily, the rest of the trends explored in this study show low mean scores and marginally higher standard deviations which suggest marginally higher data variations and lower level of agreement between the respondents. Then, climate change, loss of biodiversity, depletion of natural resources, political tensions in the closest countries and terrorist events are perceived as forces producing a modest impact—suggesting effects produced by potential threats are limited. However, the modest impact that the respondents assigned to the growth of the global economy may be indicative of limited economic growth across Italy.

Table 2
Level of impact produced by current trends and changes.

Indicators	Mean	SD
Development of forms of tourism promoting the authenticity of the place (food and wine, traditions, values, heritage, etc.)	3.7	0.978
Information and communication technology development	3.55	0.95
Development of forms of tourism promoting the creativity of the place (theme parks, events, living culture, etc.)	3.41	0.954
New emerging tourism destinations	3.27	1.024
Sophistication of the tourists' tastes	3.26	0.992
Slow food movement	3.23	1.127
Increasing tourist arrivals	3.19	0.984
Tourists' increased environmental awareness	3.07	0.944
Rapid growth of the global economy	2.82	1.189
Climate change	2.82	1.051
Loss of biodiversity	2.74	1.012
Depletion of natural resources	2.58	1.151
Political tensions in the closest countries	2.14	1.142
Terrorist events	1.5	0.895

The next set of results in Table 3 shows level of competitiveness of indicators of both groups of regions studied. Mean scores range from 2.22 to 4.28. With the aim of shedding light to the main indicators of competitiveness of both destinations, those indicators showing mean values above 3 are identified as very competitive indicators. Just over half (56%) of the indicators assessed in this study show mean scores below 3. Indicators that received low results were in the destination policy, planning and development determinant. Relevant to the low scores, the limited cooperation between small and medium enterprises and collaboration between the private and public sectors, along with the small contribution by the government developing tourism policy each confirm strategic development is needed to encourage better and more efficient integrated management system based on creativity and innovation. This may also explain the low mean scores of other indicators such as recognition of the importance of sustainable tourism development, support of locals to tourism development and events, and the development of new tourism products. Similarly, survey respondents attributed low scores to tourism educational programs and expertise, and to competency and expertise of actors involved in the tourism industry which may also be linked to the quality and efficiency of services and entrepreneurial activities. The very limited perceived competitiveness of sports and adventure facilities and of relative tourism activities indicates that Italy struggles with implementing a regeneration plan which aims at taking advantage of current opportunities. Among those indicators deemed competitive (with mean values above 3), the majority is represented by core and supporting factors, a result which seems to provide further confirmation of the strong attractiveness of those aspects that constitute the main motivators for travelling to Italy such as food, wine, heritage, climate, traditions and architecture and the relative infrastructure and facilities. The coefficients of variation obtained demonstrate that response variations in the group of values identified as not competitive are marginally larger compared to those indicators that are determined competitive by respondents. As displayed in Table 3, respondents tend to show a certain level of agreement when they are asked to identify the strengths of the destinations. On contrary, they seem not to agree on the assessment of weaknesses.

Table 3
Level of competitiveness of the factors of the northern and southern Italian regions (Regarding the Mean: 1 well below average to 5 well above average).

Indicator	Mean	SD
Variety of wine and cuisine	4.28	0.886
Food and wine service facilities	3.97	0.901
Traditional arts	3.96	0.936
Heritage	3.93	1.014
Artistic and architectural features	3.92	0.97
Historic sites	3.92	1.00
Climate	3.9	0.844
Special events, festivals	3.85	0.884
Quality of life	3.59	0.966
Rural areas	3.53	1.062
Flora and fauna	3.45	0.884
Nightlife (e.g. bars, discos, dancing)	3.41	1.186
Hospitality of residents towards tourists	3.39	1.029
Visitor accessibility to natural areas	3.37	0.981
Accommodation(variety/quality)	3.34	0.959
Museums and galleries	3.31	1.129
Security / safety of visitors	3.29	0.997
Rural tourism	3.28	1.019
Health resorts, spa	3.28	1.043
Entertainment (theatre, cinema)	3.23	1.037
International awareness of destination	3.21	1.274
Overall destination image	3.2	1.009
Value for money in destination tourism experiences	3.15	0.94
Unspoiled nature	3.13	1.004
Communication and trust between tourists and residents	3.11	1.048
National parks	3.1	1.088
Value for money in accommodation	3.09	0.917
Fit between destination products and tourists preferences	3.06	1.004
Airport efficiency/quality	3.04	1.237
Destination vision reflecting tourists values	3.04	0.949
International awareness of destination products	3.03	1.179
Nature based activities	3.02	1.104
Quality of tourism services	2.99	1.016
Destination vision reflecting community values	2.99	0.949
Community support for special events	2.95	0.976

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Accessibility of destination	2.95	0.938
Private sector recognition of importance of sustainable tourism development	2.94	1.033
Recreation facilities	2.91	1.056
Tourist guidance and information	2.91	1.083
Existence of tourist programs for visitors	2.9	1.005
Destination vision reflecting stakeholder values	2.9	0.882
Use of IT by firms	2.86	0.929
Entrepreneurial qualities of local tourism businesses	2.86	0.898
Efficiency of tourism / hospitality services	2.84	0.93
Developing and promoting new tourism products	2.84	1.011
Private sector commitment to tourism / hospitality education	2.8	0.928
Health / medical facilities to serve tourists	2.79	1.084
Sport facilities	2.78	1.087
Diversity of shopping experience	2.78	1.002
Amusement / Theme parks	2.78	1.145
Water based activities	2.77	1.156
Manager capabilities	2.77	1.076
Animation	2.76	1.01
Quality in performing tourism services	2.76	0.944
Public sector recognition of importance of sustainable tourism development	2.75	1.058
Telecommunication system for tourists	2.73	1.024
Expertise and competency of actors involved in tourism activities	2.73	0.934
Use of e-commerce	2.68	0.998
Resident support for tourism development	2.68	0.996
Existence of adequate tourism education / training programs	2.65	1.014
Adventure facilities	2.63	1.14
Development of effective destination branding	2.61	1.104
Educational structure / profile of employees in tourism	2.58	0.922
Tourism / hospitality training responsive to visitor needs	2.57	0.933
Local tourism transportation (efficiency/quality)	2.53	1.07
Co-operation between public and private sectors	2.52	0.88
Investment environment	2.51	0.983
Level of co-operation (e.g. strategic alliances) between small and medium enterprises	2.47	1.028
Public sector commitment to tourism hospitality education	2.45	1.031
Quality of research input to tourism policy, planning, development	2.37	1.012
Tourism development integrated with overall industry development	2.34	0.976
Winter based activities	2.3	1.36
Government co-operation in development of tourism policy	2.22	1.00
GRAND MEAN (GM)	**3.02**	**1.014**

3.2. Inferential statistics: differences between northern and southern Italian regions

In order to understand how differently indicators are shaping the competitiveness of the tourism destinations studied, an independent samples t-test was performed. The results measured show 41 out of 73 indicators of competitiveness in this study are below the 5% significance level. This indicated there is a difference in the level of competitiveness shown among these indicators occurring between the two destinations. The level of competitiveness of the 41 indicators listed below is considered to be on average or slightly above average in the northern Italian regions (mean scores from 2.62 to 4.03) and slightly below average or on average in the southern Italian regions (with mean scores from 1.66 to 3.31). The 95% confidence limits presented in Table 4 suggest that the level of competitiveness of indicators in northern regions is marginally higher compared to the level of competitiveness of indicators in southern regions. Such a test adds relevant information to the study of the competitiveness of the two destinations. Firstly, the lack or limited difference in the scores of most indicators which in the exploratory analysis were above the threshold of 3 suggests that the strong attractiveness of both groups of destinations is consistently based on the same main core factors. Indeed, comparable levels of competitiveness has been observed in the mean scores of food and wine, climate, heritage, traditional art, artistic and architectural features, quality of life, security and safety and other factors on the basis of which the whole country builds its global reputation. This analysis also reveals that some of those indicators from the exploratory analysis appeared to be below the threshold of 3 scored above this target by respondents of the northern regions. This indicates that the competitiveness of northern regions not only is stronger compared to that of southern regions but also it tends to adopt a cutting-edge approach in the planning process as suggested by the high scores observed in the community support for special events, destination vision reflecting stakeholders values, manager capabilities, existence of adequate tourism education and training programmes.

Table 4

Significant differences of mean values of the level of competitiveness of factors.

Factors of competitiveness	**Northern Italian regions**		**Southern Italian regions**		
	Mean	**SD**	**Mean**	**SD**	***T***
Quality of life	4.03	0.718	3.31	0.998	5.217***
Museums and galleries	3.81	1.106	3.01	1.036	4.578***
Winter based activities	3.36	1.362	1.66	0.868	8.576***
Nature based activities	3.46	1.056	2.75	1.051	4.056***
Recreation facilities	3.34	1.027	2.65	0.990	4.159***
Sport facilities	3.53	0.916	2.32	0.919	7.955***
Adventure facilities	3.25	1.108	2.25	0.984	5.878***
Health resorts, spa	3.59	0.949	3.09	1.057	2.967**
Accommodation (variety/quality)	3.64	0.804	3.16	1.003	3.146***
Tourist guidance and information	3.34	1.132	2.65	0.963	4.056***
Entertainment (theatre, cinema)	3.63	0.981	2.99	1.000	3.882***
Community support for special events	3.37	1.015	2.70	0.860	4.426***
Nightlife (e.g. bars, discos, dancing)	3.81	1.191	3.17	1.121	3.371***
Local tourism transportation (efficiency/quality)	3.07	1.112	2.19	0.895	5.360***
Diversity of shopping experience	3.08	0.952	2.59	0.990	3.041**
Amusement / Theme parks	3.31	1.149	2.45	1.021	4.817***
Health / medical facilities to serve tourists	3.46	1.072	2.38	0.871	6.848***
Animation	3.07	0.962	2.58	0.998	3.016**
Quality of tourism services	3.49	0.935	2.67	0.939	5.262***
Telecommunication system for tourists	3.20	1.013	2.43	0.919	4.872***
Accessibility of destination	3.32	1.008	2.72	0.817	4.079***
Security / safety of visitors	3.61	1.017	3.09	0.936	3.238***
Manager capabilities	3.12	1.131	2.56	0.986	3.241***
Existence of tourist programs for visitors	3.24	1.072	2.69	0.904	3.380***

Public sector recognition of importance of sustainable tourism development	3.07	1.112	2.55	0.976	3.048**
Use of e-commerce	2.98	1.110	2.50	0.883	2.965**
Use of IT by firms	3.19	0.973	2.66	0.846	3.521***
Co-operation between public and private sectors	2.83	0.958	2.33	0.777	3.500***
Entrepreneurial qualities of local tourism businesses	3.20	0.906	2.66	0.831	3.845***
Investment environment	2.83	1.053	2.31	0.886	3.286***
Efficiency of tourism / hospitality services	3.15	0.997	2.65	0.835	3.350***
Existence of adequate tourism education / training programs	3.02	1.075	2.43	0.912	3.623***
Tourism / hospitality training responsive to visitor needs	2.92	0.934	2.35	0.870	3.790***
Destination vision reflecting tourists values	3.32	0.990	2.86	0.883	2.992**
Tourism development integrated with overall industry development	2.62	0.988	2.16	0.931	2.898**
Educational structure / profile of employees in tourism	2.88	0.930	2.39	0.870	3.286***
Development of effective destination branding	2.98	1.162	2.38	1.006	3.362***
Level of co-operation (e.g. strategic alliances) between small and medium enterprises	2.86	1.074	2.23	0.923	3.906***
Quality in performing tourism services	3.12	0.975	2.55	0.860	3.801***
International awareness of destination products	3.41	1.233	2.80	1.088	3.196***
Fit between destination products and tourists preferences	3.39	0.947	2.86	0.991	3.258***

*** Significant at 1% level; ** Significant at 5% level; * Significant at 10% level

3.3. Exploratory factor analysis

Given the large number of indicators of competiveness examined in this research, an exploratory factor analysis has been performed in order to explain the relationships between the 73 indicators studied on the basis of common underlying indicators. This analysis was used to provide further proof in an attempt to strengthen the validity and reliability of the data collected. In order words, the way by which respondents consider and assess the competitiveness of the country has been tested. Table 5 shows that the total variance is divided between 12 factors whose eigenvalues are above 1.0.

Table 5
Total variance explained.

Component	Eigenvalues from Varimax Rotation		
	Total	% of Variance	Cumulative %
1	17,718	24,271	24,271
2	8,112	11,113	35,384
3	4,543	6,223	41,608
4	4,464	6,115	47,722
5	4,288	5,874	53,596
6	3,723	5,099	58,696
7	3,706	5,076	63,772

8	2,638	3,614	67,385
9	2,277	3,119	70,504
10	1,623	2,223	72,727
11	1,370	1,877	74,604
12	1,295	1,774	76,378

The final test conducted using this data is a rotation of factors to further investigate the loadings related to 73 indicators based on 12 factors. The output demonstrates that 9 out of the 12 factors found in the first part of the factor analysis explain different groups of indicators. Table 6 shows how the factor loadings of the indicators are distributed among the factors extracted. As a result, 9 factors with 73 indicators explaining 70.46% of the total variance have been identified and named considering the model explored in this study: policy, planning and development (which includes 31 indicators); supporting factors and resources (10 indicators); core resources and attractions (7 indicators); activities and related facilities (6 indicators); qualifying and amplifying determinants (5 indicators); hospitality (5 indicators); heritage (4 indicators); gastronomy (2 indicators); and accessibility (3 indicators). These results suggest that the respondents' vision of the competitiveness of Italy as a tourism destination corresponds more or less to that of the scholars who conceived and tested it.

Table 6

Factor loadings based on a principal components analysis with rotated factor matrix for 73 indicators from the factors of competitiveness.

Factor Determinants and Indicators	Factor Loadings
Factor 1. Policy, planning and development	
Existence of adequate tourism education / training programs	0.844
Tourism / hospitality training responsive to visitor needs	0.821
Public sector commitment to tourism hospitality education	0.805
Public sector recognition of importance of sustainable tourism development	0.765
Level of co-operation (e.g. strategic alliances) between SMEs	0.757
Tourism development integrated with overall industry development	0.754
Expertise and competency of actors involved in tourism activities	0.751
Investment environment	0.750
Entrepreneurial qualities of local tourism businesses	0.740
Co-operation between public and private sectors	0.737
Educational structure / profile of employees in tourism	0.732
Efficiency of tourism / hospitality services	0.705
Quality of research input to tourism policy, planning, development	0.704
Government co-operation in development of tourism policy	0.681
Private sector commitment to tourism / hospitality education	0.670
Quality in performing tourism services	0.645
Developing and promoting new tourism products	0.638
Private sector recognition of importance of sustainable tourism development	0.635
Resident support for tourism development	0.634
Use of e-commerce	0.631
Use of IT by firms	0.602

Tourist guidance and information	0.601
Existence of tourist programs for visitors	0.597
Development of effective destination branding	0.592
Manager capabilities	0.573
Telecommunication system for tourists	0.571
Destination vision reflecting tourists values	0.548
Destination vision reflecting community values	0.544
Destination vision reflecting stakeholder values	0.517
Quality of tourism services	0.516
Local tourism transportation (efficiency/quality)	0.494
Factor 2. Supporting factors and resources	
Airport efficiency/quality	0.754
Nightlife (e.g. bars, discos, dancing)	0.751
Entertainment (theatre, cinema)	0.660
Health resorts, spa	0.657
Diversity of shopping experience	0.651
Animation	0.604
Accommodation(variety/quality)	0.586
Recreation facilities	0.550
Water based activities	0.534
Special events, festivals	0.491
Factor 3. Core resources and attractions	
Unspoiled nature	0.861
Flora and fauna	0.843
Traditional arts	0.618
Artistic and architectural features	0.583
Rural areas	0.564
Climate	0.521
Rural tourism	0.471
Factor 4. Activities and related facilities	
Winter based activities	0.736
Sport facilities	0.586
Health/medical facilities to serve tourists	0.573
Nature based activities	0.564
Adventure facilities	0.545
Amusement/Theme parks	0.476
Factor 5. Qualifying and amplifying determinants	
International awareness of destination	0.742
International awareness of destination products	0.719
Overall destination image	0.660
Fit between destination products and tourists preferences	0.606
Quality of life	0.405
Factor 6. Hospitality (residents and accommodation)	
Value for money in accommodation	0.792
Value for money in destination tourism experiences	0.787
Hospitality of residents towards tourists	0.541
Security/safety of visitors	0.530
Communication and trust between tourists and residents	0.489
Factor 7. Heritage	
Historic sites	0.852
Heritage	0.839
Museums and galleries	0.688
National parks	0.670
Factor 8. Gastronomy	
Variety of wine and cuisine	0.718

Food and wine service facilities	0.597
Factor 9. Accessibility	
Visitor accessibility to natural areas	0.577
Accessibility of destination	0.569
Community support for special events	0.360

4. Discussion

This section offers a critical perspective and reflects on the interpretations of the results. This study shed light on competitive aspects and weaknesses of the destinations assessed, and the results of this study offer insight into what could be considered in a managerial context. The findings demonstrated that northern and southern Italian regions are experiencing the effects produced mainly by the increasing sophistication of the tourists' tastes. This is also influenced by the development of new forms of tourism promoting creativity or the focusing on place authenticity which also tends to fuel new trends such as the slow food movement. Moreover, such perspective confirms the importance to adapt, especially in many mature destinations, given changing tourist interests and lifestyles, new ways of experiencing a multifaceted tourist product and everything a geographical area can offer from its history to its gastronomy (see Dwyer *et al.*, 2009). In addition, the increasing number of tourists, which both northern and southern destinations are recording, may be considered a particularly alarming trend. For instance, the southern regions, unlike the northern regions, are not experiencing the positive effects of rapid growth in the global economy. Dwyer *et al*. (2009) and Ferreira and Costa (2014) argue such changing impacts could highly affect a destination whose carrying capacity cannot absorb a massive tourist demand and struggles to remain competitive in a context in which its economy is stagnant—risking then to lose control of tourism development. According to the findings, increasing environmental awareness and new information through advanced communication technology shows that the south of Italy is striving to keep up with nascent technologies. Such developments, which are fuelling today the engine of third-generation destinations, could also represent the reason why new emerging destinations are putting pressure on the Italian regions.

In terms of indicators of competitiveness, this research confirms competitiveness weaknesses and strengths of the two mature destinations based on points identified in previous studies. In fact, the results of the statistical analysis stress indicators of competitiveness representing the peculiarities of the Italian regions such as their heritage, quality of life, traditional arts, variety of wine and cuisine, climate, rural areas and events (Crouch, 2010). Other important indicators such as international awareness and value for money of based on tourist experiences offered have already been reported in other research studies where these regions were examined (see Tanizawa, 2011). Similarly, the confused organisational structure, limited cooperation of the local stakeholders and fragmentation of the tourism experiences offered relate to and help confirm previous findings (see Ferreira and Costa, 2014).

According to the findings presented above, both destinations present a high level of competitiveness in terms of gastronomy, heritage, core resources and attractors which constitute the peculiarities of the southern Italian regions (Trunfio *et al.*, 2006;

Manente, 2000; Alberti and Giusti, 2012). On the other hand, the northern regions appear to be much more competitive than southern regions in terms of activities and related facilities developed. However, a slight difference in the competitiveness of particular constructs such as accessibility, hospitality, qualifying and amplifying determinants, supporting factors and resources distinguish northern from southern regions. Moreover, in terms of policy, planning and development, these findings indicate that both destinations need to improve their performance which seems to be critically low in the southern regions. In many cases, the strongest relationships are characterized by some indicators of competitiveness such as 'existence of adequate tourism education/training programs' and 'tourism/hospitality training responsive to visitor needs' and the rest of the indicators included in the same construct. Arguably, this may entail that the competitiveness of this group of indicators depends on the development of some of them. Overall, considering the indicators of competitiveness, weaknesses and strengths, trends and changes discussed above, the northern Italian regions appear to be more competitive than the southern according to the results of this research.

Conclusion

Based on the fact that new niche markets arise and new opportunities for triggering the rejuvenation process of mature destinations, a deep understanding of how their competitiveness can be improved to make them stand out in a complex and rapidly changing tourism industry where third-generation destinations sharpen the competition is fundamental in order for them to succeed. This embodies exactly the situation of northern and southern Italian regions that are struggling to create a new competitiveness framework and to take the most of the opportunities created by changing trends. This study focused on the current competitiveness of the two Italian destinations, produced important findings that may result in important managerial and wider tourism planning implications. Given the strengths and weaknesses presented and discussed, it will be especially important that managers and tourism planners assess the influence of external trends along with relevant information that may impact all the stakeholders (e.g. planners, developers, policy-makers) who are immediately involved in the Italian tourism industry. Given the new challenging tourism contexts, it will be important that new indicators and trends be considered in order to devise and implement new strategies to make destinations across Italy more competitive.

A particular concern that needs to be addressed is ensuring tourism and hospitality educational programs are delivering contemporary courses and training programs recognize changing consumer tourism demands. These programs would allow the actors directly involved in the tourism industry to acquire necessary fundamental skills to ensure the development of a new learning system—which would make the tourism system more flexible and more responsive to changing needs and wants. Furthermore, a deeper understanding of current issues, on the basis of tourism and hospitality management and marketing, might enable managers and planners to improve the quality of tourism experiences offered and the overall image of a destination, create strategic co-operations between public and private sectors, and develop important alliances between local businesses to assemble new competitive tourism products. Such a learning system may allow these mature destinations to take the most of the ongoing development of information and communication technologies by improving the business-tourist interface and developing a stronger integrated marketing communication system. Moreover, and to conclude, all this may help them to develop and introduce cheaper cutting-edge sustainable practices to manage the increasing number of tourists and protect the environment and the local communities.

The evaluation of the competitiveness of Italian regions requires further research. In particular, cities which are at the maturity stage of their life cycle need a particular focus as these tend to be largely exploited and impacted by the tourism industry. On the other hand, given the development of niche-market trends, an investigation on the competitiveness of smaller regional entities such as towns and villages would provide relevant insight on the Italian tourism industry to provide more specific results. Based on the results of this study on macro-regions, future research in micro-regions needs to be concerned with identified weaknesses from a preliminary study. A particular focus needs to be addressed to understand how destinations deal with tourism policy, planning and development. Moreover, the very limited cooperation of local stakeholders, and the fragmentation of tourism experiences delivered, both identified in this study, clearly indicates areas for further investigation. Finally, in order to increase the probability to involve future studies, more representative and unbiased populations will be consulted in more specific locales. Then the validity and reliability of data to be collected in future studies will reach a larger number of respondents with case specific knowledge.

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Appendix 1: Survey Questionnaire

In which of the following Italian regions do you currently live? Please select one of the two groups	
North	Emilia Romagna, Friuli-Venezia-Giulia, Liguria, Lombardia, Piemonte, Trentino-Alto-Adige, Valle d'Aosta, Veneto, Toscana
South	Sicilia, Abruzzo, Basilicata, Calabria, Campania, Molise, Puglia, Sardegna

In which of the following areas does your profession fit in?
- Economics (management, marketing, finance) - Law, security and safety - - Hospitality and tourism - Agriculture, food and natural resources - - Environment - Architecture, Archeology and cultural heritage - - Education - Science, technology, engineering - Communication - - Government and public administration -

How old are you? Please select one of the following age-ranges				
18-30	31-42	43-54	55-65	Over 65

What is your gender?	
Male	Female

Please describe the extent to which the following trends and changes are creating an impact on the region you live in by making use of the scale of values provided below. 1 (slight impact); 2 (modest impact); 3 (more than modest impact); 4 (high impact); 5 (very high impact)					
Rapid growth of the global economy	1	2	3	4	5
Increasing tourist arrivals	1	2	3	4	5
Political tensions in the closest countries	1	2	3	4	5
Terrorist events	1	2	3	4	5
Depletion of natural resources	1	2	3	4	5
Climate change	1	2	3	4	5
Loss of biodiversity	1	2	3	4	5
Tourists' increased environmental awareness	1	2	3	4	5
Information and communication technology development	1	2	3	4	5
Sophistication of the tourists' tastes	1	2	3	4	5
Slow food movement	1	2	3	4	5
Development of forms of tourism promoting the authenticity of the place (food and wine, traditions, values, heritage, etc.)	1	2	3	4	5
Development of forms of tourism promoting the creativity of the place (theme parks, events, living culture, etc.)	1	2	3	4	5
New emerging tourism destinations	1	2	3	4	5

Considering the answers you provided in the previous question, please describe the extent to which the region you live in is competitive compared to the other Italian regions by rating each of the factors of competitiveness listed below. 1 (well below average); 2 (slightly below average); 3 (average); 4 (slightly above average); 5 (well above average)					
Quality of life	1	2	3	4	5
Climate	1	2	3	4	5
Unspoiled nature	1	2	3	4	5
Flora and fauna	1	2	3	4	5
Traditional arts	1	2	3	4	5
Artistic and architectural features	1	2	3	4	5
Historic sites	1	2	3	4	5
Museums and galleries	1	2	3	4	5
Heritage	1	2	3	4	5
National Parks	1	2	3	4	5
Rural Areas	1	2	3	4	5
Water based activities	1	2	3	4	5
Winter based activities	1	2	3	4	5
Nature based activities	1	2	3	4	5
Recreation facilities	1	2	3	4	5
Sport facilities	1	2	3	4	5
Adventure facilities	1	2	3	4	5
Food and wine service facilities	1	2	3	4	5
Variety of wine and cuisine	1	2	3	4	5
Visitor accessibility to natural areas	1	2	3	4	5
Rural tourism	1	2	3	4	5
Health resorts, spa	1	2	3	4	5
Accommodation (variety/quality)	1	2	3	4	5
Airport efficiency/quality	1	2	3	4	5
Tourist guidance and information	1	2	3	4	5
Special events, festivals	1	2	3	4	5
Entertainment (theatre, cinema)	1	2	3	4	5
Community support for special events	1	2	3	4	5
Nightlife (e.g. bars, discos, dancing)	1	2	3	4	5
Local tourism transportation (efficiency/quality)	1	2	3	4	5
Diversity of shopping experience	1	2	3	4	5
Amusement/Theme parks	1	2	3	4	5
Health/medical facilities to serve tourists	1	2	3	4	5
Animation	1	2	3	4	5
Quality of tourism services	1	2	3	4	5
Telecommunication system for tourists	1	2	3	4	5

Accessibility of destination	1	2	3	4	5
Communication and trust between tourists and residents	1	2	3	4	5
Hospitality of residents towards tourists	1	2	3	4	5
Security/safety of visitors	1	2	3	4	5
Value for money in destination tourism experiences	1	2	3	4	5
Value for money in accommodation	1	2	3	4	5
Manager capabilities	1	2	3	4	5
Existence of tourist programs for visitors	1	2	3	4	5
Public sector recognition of importance of sustainable tourism development	1	2	3	4	5
Private sector recognition of importance of sustainable tourism development	1	2	3	4	5
Use of e-commerce	1	2	3	4	5
Use of IT by firms	1	2	3	4	5
Co-operation between public and private sectors	1	2	3	4	5
Entrepreneurial qualities of local tourism businesses	1	2	3	4	5
Investment environment	1	2	3	4	5
Efficiency of tourism/hospitality services	1	2	3	4	5
Existence of adequate tourism education / training programs	1	2	3	4	5
Tourism/hospitality training responsive to visitor needs	1	2	3	4	5
Expertise and competency of actors involved in tourism activities	1	2	3	4	5
Destination vision reflecting tourists values	1	2	3	4	5
Destination vision reflecting stakeholder values	1	2	3	4	5
Destination vision reflecting community values	1	2	3	4	5
Developing and promoting new tourism products	1	2	3	4	5
Quality of research input to tourism policy, planning, development	1	2	3	4	5
Tourism development integrated with overall industry development	1	2	3	4	5
Government co-operation in development of tourism policy	1	2	3	4	5
Resident support for tourism development	1	2	3	4	5
Public sector commitment to tourism	1	2	3	4	5

hospitality education					
Private sector commitment to tourism/hospitality education	1	2	3	4	5
Educational structure/profile of employees in tourism	1	2	3	4	5
Development of effective destination branding	1	2	3	4	5
Level of co-operation (e.g. strategic alliances) between small and medium enterprises	1	2	3	4	5
Quality in performing tourism services	1	2	3	4	5
Overall destination image	1	2	3	4	5
International awareness of destination products	1	2	3	4	5
Fit between destination products and tourists preferences	1	2	3	4	5
International awareness of destination	1	2	3	4	5