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TOURISM COMPETITIVENESS IN MEDITERRANEAN COUNTRIES: IDENTIFICATION OF DETERMINING ATTRIBUTES

At the contemporary complex tourism market, with a large number of destinations and highly demanding customers, identifying and measuring the factors determining destination competitiveness is the key to making decisions aimed at improving competitive performance. Through different statistical techniques, this paper identifies the determinants of tourism competitiveness in Mediterranean countries, by analysing their competitive advantages and disadvantages and classifying them according to their competitive performance. The results confirm that the influence of a certain attribute on a destination's competitiveness depends on its value, but, especially, on the differentiation reached in relation to its main competitors. Hence, there is a need to use the concept of relative competitiveness.
Keywords: destination competitiveness; tourism competitiveness; Mediterranean countries.

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КОНКУРЕНЦІЯ СЕРЕДЗЕМНОМОРСЬКИХ КРАЇН У ТУРИЗМІ: ІДЕНТИФІКАЦІЯ КЛЮЧОВИХ ХАРАКТЕРИСТИК

У статті показано, що на сучасному ринку туризму, з його величезною кількістю напрямків та вибагливими клієнтами, виявлення ключових факторів впливу на конкурентоспроможність — це основа підвищення конкурентоспроможності в цілому. Використано різноманітні статистичні методики для виявлення детермінант розвитку туризму у Середземноморському регіоні, проаналізовано конкурентні переваги та недоліки країн регіону. Це дозволило класифікувати країни за групами. Вплив окремого фактору на конкурентоспроможність напрямку залежить від цінності даного фактору для клієнтів, а також від того, наскільки даний фактор робить напрямок відмінним від конкурентів.
Ключові слова: конкурентоспроможність туристичного напрямку; конкурентоспроможність у туризмі; середземноморські країни.
Табл. 5. Форм. 2. Літ. 21.

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КОНКУРЕНЦИЯ СРЕДИЗЕМНОМОРСКИХ СТРАН В ТУРИЗМЕ: ИДЕНТИФИКАЦИЯ КЛЮЧЕВЫХ ХАРАКТЕРИСТИК

В статье показано, что на современном рынке туризма, с его огромным количеством направлений и требовательными клиентами, выявление ключевых факторов влияния на конкурентоспособность — это основа повышения конкурентоспособности в целом. Использованы различные статистические методики для выявления детерминант развития туризма в Средиземноморском регионе, проанализированы конкурентные преимущества и недостатки стран региона. Это позволило классифицировать страны по группам. Влияние отдельного фактора на конкурентоспособность направления зависит от ценности данного фактора для клиентов, а также от того, насколько данный фактор делает направление отличающимся от конкурентов.
Ключевые слова: конкурентоспособность туристического направления; конкурентоспособность в туризме; страны Средиземноморья.

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Introduction

Nowadays, it is difficult to find a destination the products of which are so different, so special, that they cannot be offered by other destinations, even when dealing with specific products. In this scenario, competitiveness is the fundamental objective pursued by tourism destinations.

Moreover, the tourism product offered in any destination incorporates all the elements with capacity to satisfy tourists' needs. Therefore, when talking about competitiveness, not only should we refer to the factors related to goods and services offered by tourism businesses, but also to other factors that determine destination competitiveness (from now on referred to as DC) (Andrades et al., 2013; Caber et al., 2012; Crouch and Ritchie, 2012; Dwyer and Kim 2003; Hassan 2000; Hong, 2009; Kim and Dwyer, 2003; Mazanec et al., 2007; Namhyun, 2012; World Economic Forum, 2007; Zhang et al., 2010, inter alia).

This paper focuses on the evaluation of the relative importance of these attributes, taking into consideration that the impact of any of them on DC is a function that depends on both the importance of the attribute and the degree to which that attribute varies in competing destinations.

This article focuses on its analysis on the Mediterranean coast, one of the regions with the greatest worldwide attractiveness to tourists, characterised as a tourism area of great singularity in which there are different levels of development and tourism development models, with a strong presence of sun and sand tourism. The aim of this study is to identify the determining attributes of the relative tourism competitiveness of the countries in the Mediterranean coast, and based on it, analyse their competitive specialisation.

2. Competitiveness of tourism destinations

Interest in this concept is relatively new. The gradual emergence of new competitors has generated a scenario of hostile competition in which different actors involved in tourism development consider competitiveness as the priority objective of their actions.

At present, broad consensus has been reached on what a truly competitive tourism destination implies, "the one with 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 well-being of the destination residents and preserving the natural capital of the destination for future generations" (Ritchie and Crouch, 2003:23).

However, the problems in the analysis of tourism competitiveness derive from its relative character: a tourism destination is competitive, in relation to what? And its multidimensional nature: what specific aspects define DC?

As Pulido and Sanchez (2010) pointed out, a territory can be competitive at the markets due to many circumstances, so that the degree of DC may not demonstrate the efficiency of its economy nor the welfare level attained by population. In fact, a destination can base its competitiveness on low wages and limited social services, or on the availability of natural resources that are unique in the world, and alternatively, on the existence of high productivity that allows for high wages and social services, or on the improvement of tourism services quality, or, in general, of tourism experience. In all cases, they would be competitive tourism destinations, but the meaning of that competitiveness is radically different.

The key framework for the analysis of DC is the model of Crouch and Ritchie (1999), the main purpose of which is the integration of all the relevant factors that could characterise DC, concluding that the main attributes that explain it fall into 4 groups: supporting factors and resources, core resources and attractors, destination management, and qualifying and amplifying determinants. Later, Ritchie and Crouch (2003) incorporated an additional component in the model: destination policy, planning, and development.

In any case, conceptual models only give an idea of the extent and complexity of DC, which cannot be reduced to a small set of attributes, but instead has a long list of determinants. In this regard, recent studies (Crouch, 2011; Daskalopoulou and Petrou, 2009; Hong, 2009; Navickas and Malakauskaite, 2009; among others) have neglected the conceptual development of competitiveness models to focus, through empirical evidence, on the identification of this set of factors.

Thus, Hong (2009) proposes an analysis methodology that takes into account: comparative advantages, competitive advantages, tourism management and environmental conditions. These analytical results indicate that exogenous comparative advantages are the most important factors for the improvement of DC, while the least important attribute is domestic environment conditions.

Meanwhile, Crouch (2011) focuses his research on the weighting of the factors affecting DC, concluding that only some of them are the real determining factors or attributes. In fact, he identifies 10 factors − out of the total of 36 − as the determinants of DC, which are related to the basic resources and tourist attractions existing in the destination.

Eysteinsson and Gudlaugsson (2011) analyse the relative importance of each of the attributes that affect DC, by using a representative sample of both experts and tourists. The results show that experts and tourists would not describe competitiveness in the same way, which questions the identification of determining factors by experts.

According to Caber et al. (2012), high-quality service and appropriate customer satisfaction are the factors determining DC. In their study it is shown that different market segments differ significantly regarding the perception of DC, which results in the existence of a different set of attributes for each market segment.

Finally, Namhyun (2012) proposes a tourism destination as a model of competitiveness in two groups of countries (high-income and low-income) to identify the relevant factors of this competitiveness. The degree of impact of the factors is different between the two groups of the countries analysed: for high-income countries, the most important factor is core resources; while for low-income countries it is the globalisation of the economy.

The list of determining factors for DC is extensive, therefore, the evaluation of the relative importance of each of them has a special significance, since the importance of a given factor depends not only on having an adequate assessment of that attribute, but also it is necessary that significant differences exist between a destination and its competitors (Crouch and Ritchie, 2012).

3. Research design

As a basis for this study, the conceptual model of Ritchie and Crouch (2003) has been used, as it is the most cited model in literature on the issue.

For this analysis, the 12 most competitive countries in the Mediterranean region have been considered: Bulgaria, Croatia, Cyprus, Egypt, Spain, France, Greece, Italy, Malta, Morocco, Tunisia and Turkey.

Moreover, all potential attributes that, according to the Travel & Tourism Competitiveness Index (TTCI) by the World Economic Forum (WEF), influence DC, have been taken into account. The TTCI aims to measure all the aspects identified as the determinants of DC in the countries around the world. The TTCI is based on 3 subindices, each composed of a series of pillars which measure the competitiveness of each group, which, in turn, are based on a series of attributes measuring competitiveness.

The time horizon analysed is determined by the availability of information, since the database provided by the WEF began to be elaborated in 2007 and the latest report was published in 2011. Finally, to achieve the objective proposed in this research, a statistical analysis has been designed, which is developed in 3 stages:

— determine which of the 75 attributes identified by the TTCI that actually determine tourism competitiveness among the countries of the Mediterranean coast;

— analyse the competitive specialisation of the countries studied, identifying their competitive advantages and disadvantages compared to other nearby destinations;

— carry out a classification of the destinations based on the common attributes on which their competitive performance is founded.

4. Analysis and results

In order to achieve the first objective, the 12 countries analysed have been classified in two distinct groups, using the TTCI as a criterion. On one hand, the 6 most competitive Mediterranean countries (France, 5.41; Spain, 5.29; Cyprus, 4.89; Malta, 4.88; Italy 4.87; and Greece, 4.78) and, on the other hand, the 6 least competitive countries (Croatia, 4.61; Tunisia, 4.39; Bulgaria, 4.39; Turkey 4.37; Egypt 3.96; and Morocco, 3.93), in terms of tourism, have been considered.

Following this, a mean equality contrast has been carried out for each of the 75 indicators, in order to determine which of them show differences in the average values of the two groups. Due to the non-normality of some indicators and the limited number of observations, it has not been possible to use t-test. Therefore, the non-parametric alternative to the t-test has been chosen, i.e., the Mann-Whitney U-test. This test compares the value of an indicator of each country within the group of more competitive countries with the value of that same indicator for each country in the group of less competitive countries, and calculates the number of cases in which the value of that indicator in a country of the second group is higher than the value of that same indicator in a country of the first group.

In this case, and given that each group is made up of 6 countries, the total number of comparisons performed is 36. Therefore, when the statistic U is close to 0, it indicates a higher average value in the group of more competitive countries; whereas when U is close to 36, it indicates a higher average value in the group of less competitive countries. In contrast, intermediate values of U (away from both 0 and 36) are a clear sign that no significant differences exist in the value of the indicator in either group.

Table 1 shows that, within those included in the first subindex, the only pillar that makes a significant difference is number 4 (health and hygiene), as significant differences between the two groups of countries are present on 3 of its 4 indicators.

However, carbon dioxide emissions could be used as a distinguishing feature of less competitive countries.

Table 1. **Subindex A: T&T regulatory framework**

Indicator	U statistic (exact bilateral significance)
(1.01) Prevalence of foreign ownership	11,5 (0,310)
(1.02) Property rights	6,0 (0,065)
(1.03) Business impact of rules on FDI	16,5 (0,818)
(1.04) Visa requirements	13,0 (0,485)
(1.05) Openness of bilateral Air Service Agreement	14,0 (0,589)
(1.06) Transparency of government policymaking	16,0 (0,818)
(1.07) Time required to start a business	8,5 (0,132)
(1.08) Cost to start a business	12,0 (0,394)
(1.09) GATS commitments	14,0 (0,589)
(2.01) Stringency of environmental regulation	10,0 (0,240)
(2.02) Enforcement of environmental regulation	11,5 (0,310)
(2.03) Sustainability T&T industry development	17,5 (0,937)
(2.04) Carbon dioxide emissions	**34,0 (0,009)***
(2.05) Particulate matter concentration	16,0 (0,818)
(2.06) Threatened species	11,0 (0,310)
(2.07) Environmental treaty ratification	6,0 (0,065)
(3.01) Business costs of terrorism	14,0 (0,589)
(3.02) Reliability of police services	7,0 (0,093)
(3.03) Business costs of crime and violence	12,5 (0,394)
(3.04) Road traffic accidents	**3,0 (0,015)***
(4.01) Physician density	**5,0 (0,041)***
(4.02) Access to improved sanitation	**4,5 (0,026)***
(4.03) Access to improved drinking water	**3,0 (0,015)***
(4.04) Hospital beds	8,0 (0,132)
(5.01) Government prioritization in T&T industry	14,0 (0,589)
(5.02) T&T government expenditure	10,0 (0,240)
(5.03) Effective marketing and branding	18,0 (1,000)
(5.04) Comprehensive annual T&T data	10,0 (0,240)
(5.05) Timeliness of providing T&T data	8,0 (0,132)

(*) Test statistically significant at the 5% significance level.
Source: Authors' own elaboration from the TTCI data.

The analysis of the subindex B of the WEF (Table 2) shows that the ICT infrastructure (pillar 9) has an particularly important role in the tourism competitiveness of Mediterranean countries, as significant mean differences are observed in 3 of the 5 indicators that are part of it.

Table 2. **Subindex B: T&T business environment and infrastructure**

Indicator	U statistic (exact bilateral significance)
(6.01) Quality of air transport infrastructure	10,0 (0,240)
(6.02) Available seat kilometres domestic	14,0 (0,589)
(6.03) Available seat kilometres international	11,0 (0,310)
(6.04) Departures per 1,000 population	**1,0 (0,004)***
(6.05) Airport density	6,0 (0,065)
(6.06) Number of operating airlines	11,0 (0,310)
(6.07) International air transport network	9,5 (0,180)
(7.01) Quality of roads	11,0 (0,310)
(7.02) Quality of railroad infrastructure	7,5 (0,093)
(7.03) Quality of port infrastructure	9,5 (0,180)
(7.04) Quality of ground transport network	16,0 (0,818)

Continuation of Table 2.

(7.05) Road density	**0,0 (0,002)***
(8.01) Hotel rooms	**5,0 (0,041)***
(8.02) Presence of major car rental company	14,5 (0,589)
(8.03) ATMs accepting Visa cards	7,0 (0,093)
(9.01) Extent of business Internet use	15,0 (0,699)
(9.02) Internet users	**4,0 (0,026)***
(9.03) Telephone lines	**1,0 (0,004)***
(9.04) Broadband Internet subscribers	**0,0 (0,002)***
(9.05) Mobile telephone subscribers	10,0 (0,240)
(10.01) Ticket taxes and airport charges	11,0 (0,310)
(10.02) Purchasing power parity	**36,0 (0,002)***
(10.03) Extent and effect of taxation	17,5 (0,937)
(10.04) Fuel price levels	10,5 (0,240)
(10.05) Hotel price index	**35,0 (0,004)***

(*) Test statistically significant at the 5% significance level.
Source: Authors' own elaboration from the TTCI data.

On the other hand, pillar 10 (price competitiveness in the T&T industry) is a competitive factor favourable for the countries with lower competitiveness. Therefore, it seems to be confirmed that first-class hotels in less competitive Mediterranean countries are clearly moving towards a policy of price competitiveness.

Finally, the analysis of the subindex C (Table 3) shows that the only pillar that generates differences in DC of Mediterranean countries is number 11 (human resource). However, hiring and firing practices are adversely affecting the competitiveness of more competitive Mediterranean tourism destinations, on the contrary, they can be considered as regional competitive advantages for less competitive Mediterranean countries.

Table 3. **Subindex C: T&T human, cultural and natural resources**

Indicator	U statistic (exact bilateral significance)
(11.01) Primary education enrolment	**5,0 (0,041)***
(11.02) Secondary education enrolment	**1,0 (0,004)***
(11.03) Quality of the educational system	13,5 (0,485)
(11.04) Local availability of research	9,5 (0,180)
(11.05) Extent of staff training	12,0 (0,394)
(11.06) Hiring and firing practices	**31,0 (0,041)***
(11.07) Ease of hiring foreign labor	10,0 (0,240)
(11.08) HIV prevalence	6,0 (0,065)
(11.09) Business impact of HIV/AIDS	15,5 (0,699)
(11.10) Life expectancy	**0,0 (0,002)***
(12.01) Tourism openness	13,0 (0,485)
(12.02) Attitude of population toward foreign visitors	11,5 (0,310)
(12.03) Extension of business trips recommended	16,0 (0,818)
(13.01) Number World Heritage natural sites	10,5 (0,240)
(13.02) Protected areas	10,0 (0,240)
(13.03) Quality of the natural environment	15,5 (0,699)
(13.04) Total known species	7,0 (0,093)
(14.01) Number World Heritage cultural sit.	12,0 (0,394)
(14.02) Sports stadiums	6,0 (0,065)
(14.03) Number of international fairs and exhibitions	10,0 (0,240)
(14.04) Creative industries exports	15,0 (0,699)

(*) Test statistically significant at the 5% significance level.
Source: Authors' own elaboration from the TTCI data.

In conclusion, only 17 of the 75 indicators used by the WEF to measure tourism competitiveness of Mediterranean countries differ significantly between countries.

Our second aim is to further analyse the 17 indicators selected, in order to ascertain where to find the competitive advantages and disadvantages in the Mediterranean basin, identify the extent to which the DC of a country is determined by certain factors and whether there is a certain degree of specialization in the DC of the countries analysed.

To do this, it must be borne in mind that, although the theoretical range of all the indicators of DC that has been used is equal to 6, since all the indicators take values ranging between 1 and 7, the fact remains that the actual range is not the same in all the indicators. Therefore, for the rest of the analysis, a homogenization of the range of the 17 indicators identified is performed on the scale [0:1]. This homogenization is carried out as follows:

$$z_{ij} = \frac{x_{ij} - \min(x_{ij})}{\max(x_{ij}) - \min(x_{ij})}, \tag{1}$$

where X_{ij} is the value of the indicator j for country i; $max (X_{ij})$ and $min (X_{ij})$ are the maximum and minimum values of the indicator j in the set of the countries analysed; and Z_{ij} is the normalized value of the indicator j for country i. The normalized value Z_{ij} will take the value of 1 for the country of the Mediterranean area which plays a leading role in this particular indicator (regional competitive advantage), and the value of 0 for the country of the Mediterranean area in the last position regarding that same indicator (regional competitive disadvantage).

Once the homogenisation of the previously selected indicators has been carried out, the values Z_{ij} will be used to:

a) define the possible competitive specialisation of some Mediterranean countries.
b) establish groups of countries with high degree of competitive homogeneity.

In order to achieve the first objective, a competitive specialisation index was defined, which consists in the simple aggregation of the values Z_{ij} for each of the countries analysed in each of the 3 subindices of tourism competitiveness considered by the WEF, that is:

$$\delta_i = \sum_{j=1}^{n} z_{ij}, \tag{2}$$

where n is the number of indicators of each subindex in which significant differences have been found between the most and the least competitive countries. Specifically, n is 5 in subindex A, 8 in subindex B, and 4 in subindex C. Furthermore, it is clear that:

$$0 \leq \delta_i \leq n$$

The competitive specialisation indices for the 12 analysed countries in the 3 competitiveness subindices considered by the WEF are shown in Table 4.

The greatest specialisation in T&T regulatory framework (subindex A) takes place in France (4.25 points). This country is a regional leader by the competitiveness in two indicators of this subindex. Noteworthy is also the case of Malta (4.19), which shows local competitive advantages on 3 indicators. The lowest levels of tourism specialisation in this first subindex are to be found, mainly, in two countries: Tunisia (2.53) and, especially, Morocco (1.33).

Table 4. **Competitive specialization indices of the Mediterranean countries**

Country	δ_i Subindex A [0;5]			Country	δ_i Subindex B [0;8]			Country	δ_i Subindex C [0;4]		
France	* = 2	(4.02) (4.03)	4.25	Malta	* = 3	(7.05) (8.01) (9.03)	6.06	Cyprus	* = 0	-	3.51
	** = 0	-			** = 0				** = 0	-	
Malta	* = 3	(3.04) (4.02) (4.03)	4.19	Spain	* = 1	(8.01)	5.05	Greece	* = 1	(11.02)	3.09
	** = 0	-			** = 0	-			** = 0	-	
Bulgaria	* = 2	(4.02) (4.03)	4.00	Cyprus	* = 2	(6.04) (8.01)	5.01	France	* = 0	-	3.05
	** = 0	-			** = 0	-			** = 0	-	
Italy	* = 2	(4.02) (4.03)	3.98	France	* = 3	(7.05) (9.02) (9.04)	4.89	Tunisia	* = 0	-	2.96
	** = 0	-			** = 1	(10.05)			** = 0	-	
Spain	* = 2	(4.02) (4.03)	3.98	Croatia	* = 1	(8.01)	4.35	Bulgaria	* = 1	(11.06)	2.85
	** = 0	-			** = 0	-			** = 0	-	
Croatia	* = 0	-	3.75	Italy	* = 2	(7.05) (8.01)	4.06	Italy	* = 1	(11.10)	2.84
	** = 0	-			** = 1	(10.02)			** = 0	-	
Greece	* = 2	(4.01) (4.03)	3.73	Bulgaria	* = 0	-	3.91	Spain	* = 1	(11.01)	2.84
	** = 0	-			** = 0	-			** = 1	(11.06)	
Cyprus	* = 2	(4.02) (4.03)	3.34	Greece	* = 0		3.77	Malta	* = 0	-	2.66
	** = 1	(2.04)			** = 0				** = 0	-	
Turkey	* = 0	-	3.36	Tunisia	* = 0	-	2.65	Turkey	* = 0	-	2.36
	** = 0	-			** = 0	-			** = 0	-	
Egypt	* = 0	-	3.22	Turkey	* = 0	-	2.44	Croatia	* = 0	-	1.78
	** = 1	(3.04)			** = 0	-			** = 1	(11.01)	
Tunisia	* = 0	-	2.53	Egypt	* = 2	(10.02) (10.05)	2.10	Morocco	* = 0	-	1.76
	** = 0	-			** = 4	(6.04) (7.05) (9.02) (9.04)			** = 1	(11.02)	
Morocco	* = 1	(2.04)	1.33	Morocco	* = 0	-	1.68	Egypt	* = 0	-	1.72
	** = 3	(4.01) (4.02) (4.03)			** = 2	(8.01) (9.03)			** = 1	(11.10)	

(*) Values Z_{ij}=1 (advantages) / (**) Values Z_{ij} =0 (disadvantages).
Source: Authors' own elaboration.

In subindex B (T&T business environment and infrastructure), the highest competitive specialisation occurs in Malta (6.06 points). Spain (5.05) and Cyprus (5.01) are also among the Mediterranean countries which base their tourism competitiveness on infrastructure. The lowest competitive specialisation index (1.68) is so far, the Moroccan, and Egypt (2.10), with 4 local competitive disadvantages, is the second Mediterranean country with lower level of competitiveness in terms of infrastructure and ICT.

Regarding the subindex "T&T human, cultural and natural resources", Cyprus is the country with the highest competitive specialization index (3.51 points). This value is explained by its strong relative position in the 4 HR indicators (in all of them, Cyprus reaches around 90% of the value of the countries with respective local competitive advantages). It is worth highlighting Greece and France, which exceed 3 points in this competitive specialisation index. In contrast, the least competitive countries in this subindex are Croatia, Morocco and Egypt, with the scores below 1.8.

Finally, to identify the groups of Mediterranean countries showing high competitive homogeneity, the classification technique known as k-means algorithm has been used, for which the total of k = 4 groups have been considered. This clustering method uses the Euclidean distance between the centroids of the clusters and, based on the initial solution, each country is reassigned to that cluster whose centroid (mean vector of the competitiveness indicators used) is closest (shortest Euclidean distance) to that country. After an iterative process of reassignments, the final solution is obtained when all the countries are closer to the centroid of the cluster in which they have been classified than to the centroid of any other cluster.

To perform this classification, the normalised values Zij of the 17 indicators of the WEF previously selected have been considered. The results allow for the classification of Mediterranean countries into 4 groups homogenous in terms of tourism competitiveness (Table 5).

Table 5. **Classification of the countries by competitive homogeneity**

Indicator	Bulgaria, Croatia	Cyprus, France, Greece, Italy, Malta, Spain	Morocco	Egypt, Tunisia, Turkey
(2.04) Carbon dioxide emissions	0,420	*0,222*	**1,000**	0,831
(3.04) Road traffic accidents	0,730	**0,844**	0,329	0,297
(4.01) Physician density	0,764	0,856	*0,000*	0,370
(4.02) Access to improved sanitation	**0,984**	**0,990**	*0,000*	0,677
(4.03) Access to improved drinking water	**0,974**	**1,000**	*0,000*	0,860
(6.04) Departures per 1,000 population	*0,164*	0,427	*0,061*	*0,050*
(7.05) Road density	*0,252*	**0,860**	*0,032*	*0,101*
(8.01) Hotel rooms	**0,967**	**0,931**	*0,000*	0,267
(9.02) Internet users	0,487	0,664	0,346	0,144
(9.03) Telephone lines	0,504	0,773	*0,000*	*0,095*
(9.04) Broadband Internet subscribers	0,426	**0,711**	*0,007*	*0,105*
(10.02) Purchasing power parity	0,679	*0,178*	0,714	**0,821**
(10.05) Hotel price index	0,653	*0,261*	0,515	**0,815**
(11.01) Primary education enrollment	*0,318*	**0,806**	0,473	0,594
(11.02) Secondary education enrollment	0,688	**0,891**	*0,000*	0,495
(11.06) Hiring and firing practices	0,726	0,379	0,842	**0,853**
(11.10) Life expectancy	0,583	**0,926**	0,444	0,404

In bold – competitive advantages; in italics – competitive disadvantages.
Source: Authors' own elaboration.

Bulgaria and Croatia, which could be called Mediterranean emerging countries, base their DC, mainly, on health and hygiene aspects, and a wide range of hotel services. However, there are factors that are burdening the DC of these two countries of the eastern Mediterranean: little air traffic, poor land transport networks and low educational level of its population.

On the other hand, the factors that help explain the DC of mature countries (Cyprus, France, Greece, Italy, Malta and Spain), and differentiate them from other Mediterranean countries, are, in addition to health and hygiene aspects, low average level of road traffic accidents, high level of land transport networks, hotel rooms, access of most of the population to broadband Internet, high rates of enrolment in primary and secondary education and the increased life expectancy of population. However, they also show some significant competitive disadvantages, mainly the high average level of carbon dioxide emissions and the limited ability to compete on price.

The third group is made up, exclusively, by a country, which has been called low country. This is the least competitive country in the entire Mediterranean area, Morocco, which has only one competitive advantage and however, its competitive disadvantages are numerous.

Finally, the so-called inexpensive countries (Egypt, Tunisia and Turkey), are basing their DC on prices. Their belonging to less competitive Mediterranean countries is due, mainly, to infrastructure problems.

5. Conclusion

The research carried out evidences the interest to identify the factors that actually determine DC. Based on the information provided by the WEF (75 tourism competitiveness factors), it is possible to disaggregate two groups of Mediterranean countries by their level of tourism competitiveness. However, an analysis of relative competitiveness of each of these countries with respect to the others has allowed for the identification of the attributes (17 factors) that truly differentiate the level of competitiveness of Mediterranean countries.

From these factors, a new classification of Mediterranean countries has been made, verifying a significant improvement in the relative position of some countries in the ranking, especially Bulgaria and Croatia. This confirms the approach advocated by Crouch and Ritchie (2012), according to which the importance of a factor as a determinant of DC depends not only on an adequate assessment of that attribute, but it is also necessary that significant differences exist, in relation to that attribute, between a destination and its competitors.

Moreover, this study has identified the factors to which each country should pay attention in order to improve their competitive performance in relation to its main competitors on Mediterranean coast.

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