Competitiveness Review

The competitiveness of the Uruguayan rural tourism sector and its potential to attract German tourists

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Abstract
Purpose – The purpose of this paper is to assess the competitiveness of the Uruguayan rural tourism sector against its main competitors from Argentina and Brazil, as perceived by Uruguayan stakeholders on the supply side. The paper will also evaluate the potential of Uruguay as a rural tourism destination in attracting German tourists.

Design/methodology/approach – Two different questionnaires were administered, one to Uruguayan rural tourism stakeholders and another one to potential German tourists in Germany.

Findings – The findings indicate that the main strengths of Uruguayan rural tourism offer, compared to Argentina and Brazil, are the hospitality and friendliness of local people, the natural and cultural attractions and the country's security and safety. Main weaknesses identified were the poor management of several destination components that are key to create a successful tourism destination and poor management of the "demand conditions" component of Dwyer and Kim's (2003) integrated model.

Originality/value – There is very limited research done on the competitiveness of Uruguay as a rural tourist destination in attracting foreign tourists (Mackinnon *et al.*, 2009). The objective of this study is to partially fill this gap by assessing how competitive Uruguayan rural tourism is and evaluating whether Uruguay represents an attractive market for German tourists looking for agro tourism and farm holiday destinations. The German market was chosen because it is one of the top tourist-generating countries and one of the biggest spenders in international tourism (The World Tourism organization, 2010). Moreover, most tourists – from outside South America – selecting Uruguay as a tourist destination come from Germany, USA and Australia (Peralta, 2012).

Keywords Competitiveness, Dwyer and Kim's (2003) framework, Rural tourism

Paper type Research paper

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Introduction
Uruguay is a relatively small country on the south-eastern part of South America, with an area of 176,215 sq. km (Mackinnon *et al.*, 2009). It has a population of 3.3 million

habitants and receives around two million tourists each year. Despite the global financial crisis, international tourists visiting Uruguay have increased by 15 per cent – from 1,824,340 to 2,098,780 – between 2008 and 2009 (Gallardo, 2010).

Tourism is a relatively new industry that has grown rapidly becoming one of the world's largest providers of employment and contributing 9.1 per cent of the world gross domestic product (Camtur, 2008; Valdez *et al.*, 2010; World Travel and Tourism Council, 2011). The fact that tourism products can only be consumed "in situ", means that the revenue generated by the tourism sector is kept within the tourist receiving destination (Ferreira and Estevão, 2009). However, many tourist destinations lose revenue to other countries' economies, and therefore, the "leakage effect" must also be taken into consideration (Mill, 2002).

Tourism – if conducted in a sustainable way – can provide an alternative for local or national development by improving income levels, employment and tax revenues in the tourist receiving country (Barbosa *et al.*, 2010). All these benefits make rural tourism an attractive option to develop rural areas in Uruguay. For instance, a farm that diversifies into rural tourism creates on average three more workplaces compared with a non-diversified farm. Moreover, in the case of rural tourism in Uruguay, the degree of leakage is small as the attractiveness of the offer relies on what Uruguay has to offer (Mackinnon *et al.*, 2009).

It has to be noted that the tourism sector has become very competitive, and therefore, organisations need to successfully use their resources to develop appealing and competitive tourism products to attract domestic and international tourists (Cracolici *et al.*, 2006). Consequently, Uruguayan rural tourism establishments would only attract international tourists if they manage to develop a tourism product that delivers at least the same level of quality than that offered by their counter rivals from Argentina and Brazil (Gallardo, 2010). In general, it can be said that Uruguayan rural tourism offers are linked to agro tourism, cultural tourism, sport tourism, tourism in local communities, eco-tourism and culinary tourism. Currently, more than 100 rural establishments including wineries, guest ranches, rural hotels and rural bed and breakfast are registered at the Ministry of Tourism and Sport (Mintur, 2011). They offer a wide range of activities such as participation in or observation of rural activities, trail-rides, horse-riding, fishing, bird watching and nautical activities (Federici, 2011; Quintana, 2010).

Whereas in many other countries, rural tourism is one of the leading touristic activities, in Uruguay, its importance has been neglected for a long time. Rural tourism in Uruguay was initially originated as a business initiative from a group of Uruguayan farmers with entrepreneurial skills looking for additional sources of income. They realised that some Uruguayan farms would meet the requirements to compete in this relatively new form of tourism (Bentancur, 2008). However, it took a lot of time for the government to realise the potential of rural tourism. In fact, for many years, the Ministry of Tourism was mainly focused on developing coastal tourism. Only recently, the government has recognised that there was potential to develop other forms of tourism such as rural tourism, thermal tourism and city tourism (Brida *et al.*, 2008). Alternative forms of tourism are less influenced by the seasonality and would reduce the strong dependency that Uruguayan tourism has on summer tourists that opt for a beach holiday along the south-east coast of the country. Rural tourism could represent a way of overcoming seasonality by offering tourists a different tourist product that can be consumed all year around and not only during the summer months. However, it should be taken into account that a consumer looking for a summer holiday might not be attracted to a rural holiday offer. Therefore, Uruguay should try to develop these two different tourist markets, understanding the preferences of each market and delivering an appealing product offering for each market.

The Uruguayan Chamber of Tourism has played an active role in fostering the development of alternative forms of tourism and trying to position the rural tourism sector as a major source of tourism (Camara Uruguaya de Turismo Magazine, 2010). A successful marketing strategy pursued by the Uruguayan government has been to develop a country's brand, under the name of "Uruguay Natural", to promote the country's image abroad as an idyllic tourism destination with plenty of natural and "unspoilt" surroundings. The tourism sector has benefited enormously from this marketing strategy which has contributed to attract a higher number of international tourists looking for holidays in less developed countries. The destination brand "Uruguay Natural" was launched in 2003, and the number of tourists has continuously increased ever since (Campanella, 2010). Also, the Uruguayan government has recently been granted a five million dollar loan to promote and enhance the rural tourism sector within six Uruguayan provinces located in the Uruguay River corridor (Inter-American Development Bank, 2011).

In light of the rapid development of rural tourism during the past few years, and the government efforts to promote and enhance the rural tourism offer in Uruguay, it becomes imperative to assess the competitiveness of the Uruguayan rural tourism sector. In fact, this is a good moment to try to develop this industry by taking advantage of an improvement in reputation of Uruguay as a tourist destination. Uruguay is ranked 58 of the 139 destinations assessed by the Travel and Tourism Competitiveness Report 2011. More importantly, Uruguay was listed as one of the top ten tourist destinations in the Americas for the first time (Blanke and Chiesa, 2011; WEF, 2011). However, there is very limited research done on the competitiveness of Uruguay as a rural tourist destination in attracting foreign tourists (Mackinnon *et al.*, 2009). The objective of this study is to partially fill this gap by assessing how competitive Uruguayan rural tourism is and evaluating whether Uruguay represents an attractive market for German tourists looking for agro tourism and farm holiday destinations. The German market was chosen because it is one of the top tourist-generating countries and one of the biggest spenders in international tourism (The World Tourism organization, 2010). Moreover, most tourists – from outside South America – selecting Uruguay as a tourist destination come from Germany, USA and Australia (Mintur, 2011). If Uruguay aims at further increasing the number of tourists coming from developed countries, it must understand the competitiveness of the sector and the needs and perceptions of potential tourists. This study will assess the potential of Uruguay as a rural tourism destination in attracting German tourists. It is interesting to note that both nature-based tourism as well as adventure tourism has been steadily growing in Germany for the past few years. Demand for these forms of tourism is expected to remain high as people who work and live in cities seek natural experiences and look for unique and exotic destinations. Existing research indicates that many German tourists are willing to accept a limited tourism infrastructure to be able to enjoy a unique and authentic experience (Arlt, 2006). Authenticity in the tourism industry refers to the need of tourists from developed countries – such as Germany – looking for places where everything is real and original

(Petroman *et al.*, 2010). The authenticity of rural areas in exotic destinations has become increasingly popular (Boyd, 2002; Ciolac *et al.*, 2011).

Competitiveness

Many scholars have agreed that competitiveness is a very complex phenomenon which is influenced by the interaction of many factors such as internal capabilities, the external environment, the business context, the government, social agents, culture, globalisation, etc. (Porter, 1998; Valdez *et al.*, 2010). The term has evolved over time to incorporate the impact that businesses have on the rest of society, including their own stakeholders and the environment (Barbosa *et al.*, 2010).

There are several definitions of competitiveness in the tourism literature (Wilde and Cox, 2008). Scott and Lodge's (1985, p. 3) definition of competitiveness refers to "a country's ability to create, produce, distribute, and/or service products in international trade while earning rising returns on its resources". Other scholars such as Newall (1992) believe that national prosperity can only be achieved by increasing the quality and quantity of goods and services that are successfully marketed to international and domestic consumers. A challenge identified by those scholars who have researched on Destination Management Organisations lies in the difficulties to demonstrate the additional value from marketing interventions (Buhalis, 2000; Morgan *et al.*, 2012).

According to Barbosa *et al.* (2010), competitiveness is the ability to survive and achieve profitable growth in competing or new markets. Other researchers refer to competitiveness as an opportunity to develop more sustainable communities (Ferreira and Estevão, 2009). Cracolici *et al.* (2006) have expanded this definition to include prosperity not only at a community level but also at a firm level. Destination performance plays an important role in maintaining the competitive advantage developed by a tourist place. Effective destination performance should be based on key performance indicators; identify certification options; assess visitor satisfaction; measure the economic, social and environmental impact; monitor potential risks; identify strategies for continual improvement and innovation and communicate and report on destination performance achievements (Morgan *et al.*, 2011).

Despite being different perspectives on competitiveness, there is agreement on some factors of competitiveness that cannot be overlooked while looking at the competitiveness of the tourism industry. These are the micro and macro environmental factors. The microeconomic environment is integrated by residents, local actors, employees, the media, the government and financial institutions. The macroeconomic environment relates to those external factors affecting the competiveness of the tourist industry such as demographic trends, the restructuring of the economy and the interaction between technology and human resources (Valdez *et al.*, 2010).

To assess the competitiveness of a tourist destination, it is important to consider the principles of comparative and competitive advantage and how they interact with each other (Wilde and Cox, 2008). The interplay of these two factors plays a major role in achieving a successful position within a very competitive industry such as tourism (Ferreira and Estevão, 2009). A country, company or region has a comparative advantage when they can produce a product/service at a lower opportunity cost than a competitor. Comparative advantage results from different factor endowments such as human resources, physical resources, knowledge resources, capital resources, historical and cultural resources, infrastructure and tourism superstructure (Cracolici *et al.*, 2006).

Comparative advantage in tourism strongly influences consumers' destination choice. For instance, the existence of some resources such as natural attractions will determine a destination's competitive situation. Natural resources change overtime; therefore, a sustainable exploitation of these resources will guarantee the long-term competitiveness of a destination (Barbosa *et al.*, 2010). Natural endowments may form a source of comparative advantage; however, the way that organisations add value to these resources will give some organisations a competitive advantage over competing tourists' destinations (Crouch and Ritchie, 1999).

Competitive advantage is concerned with the most effective use of the available resources to provide consumers with more value than competitors. Therefore, countries that are not rich in natural resources still might develop a competitive advantage in the tourism sector (Barbosa *et al.*, 2010). Competitive advantage can be achieved either by differentiation or by offering a similar perceived tourist product than competitors at a lower cost (Jobber, 2006). Hence, competitive advantage of a tourist destination can only be achieved if the overall attractiveness and the tourist experience offered are superior to that of other tourism destinations available to potential tourists (Dwyer and Kim, 2003).

The more similarities competing tourist destinations have the more important is the management of natural resource endowments to create competitive advantage. Dwyer and Kim (2003) conclude from a review of existing literature that competitiveness is associated with three mayor groups of thoughts: the comparative advantage and/or price competitiveness perspective, the strategy and management perspective and the historical and socio-cultural perspective.

The principles of comparative and competitive advantage help to understand competitiveness. However, they do not delve into ways of measuring it. Because competitiveness should be considered a multi-dimensional concept, measuring it is a very complex task. To measure destination competitiveness, the most important factors affecting competitiveness need to be identified. Then, the level of analysis (product, industry or country-level) and from which perspective will the analysis be conducted (industry, government or customer point of view) need to be defined (Mazanec *et al.*, 2007).

There is a range of well-known models suitable to assess an economy on the basis of its potential to create sources of advantage. Although these general models, usually found within the literature of competitiveness, can be adapted to improve their application to the needs of the tourism industry, they are not sufficient to address all considerations relevant to destination competitiveness (Wilde and Cox, 2008). There are also several frameworks developed with the purpose of looking at destination competitiveness from the tourism industry perspective (Ferreira and Estevão, 2009). Some of the most relevant ones are briefly discussed below.

As a response to the continuous development of different types of tourism and changes in tourism demand, Crouch and Ritchie (1999) developed a "Conceptual Model of Destination Competitiveness" to analyse the competitiveness of tourism destinations. The model is based on the theories of comparative advantage (Smith, 1776; Ricardo, 1817) as well as on two of the most popular strategic models "Porter's Five Forces" and "Porter's Diamond" (Valdez *et al.*, 2010). This model is integrated by five elements: qualifying and amplifying factors, destination policy, planning and development, destination management, core resources and attractors and supporting factors and resources. It focuses on long-term economic prosperity and incorporates economic, ecologic, social, cultural and political aspects of the destination country (Ritchie and Crouch, 2003). Crouch and Ritchie's model is considered one of the most appropriate frameworks to understand the interplay and relationship between the various factors influencing the tourism competitiveness (Armenski *et al.*, 2011).

Dwyer and Kim (2003) and Dwyer *et al.* (2003) also developed a holistic model to help identifying the underlying variables of a country's tourism competitiveness. Dwyer and Kim's (2003) "Integrated Model" – as shown in Figure 1 – aims to improve Crouch and Ritchie's (1999) model by developing a framework that reflects a more realistic relationship between the major elements of destination competitiveness. To achieve this, the different factors involved in destination competitiveness were reclassified. For example, the "Integrated Model" makes a distinction between inherited (endowed) and created resources and incorporates "market ties" in supporting factors instead of being listed as core resources and attractors.

Dwyer and Kim's (2003) integrated model of tourist destination competitiveness was empirically tested in Australia, Korea and Slovenia (Gomezelj and Mihalic, 2008a, 2008b). The findings from these studies could be used to inform strategic decisions taken by tourism stakeholders to foster destination competitiveness. The authors of

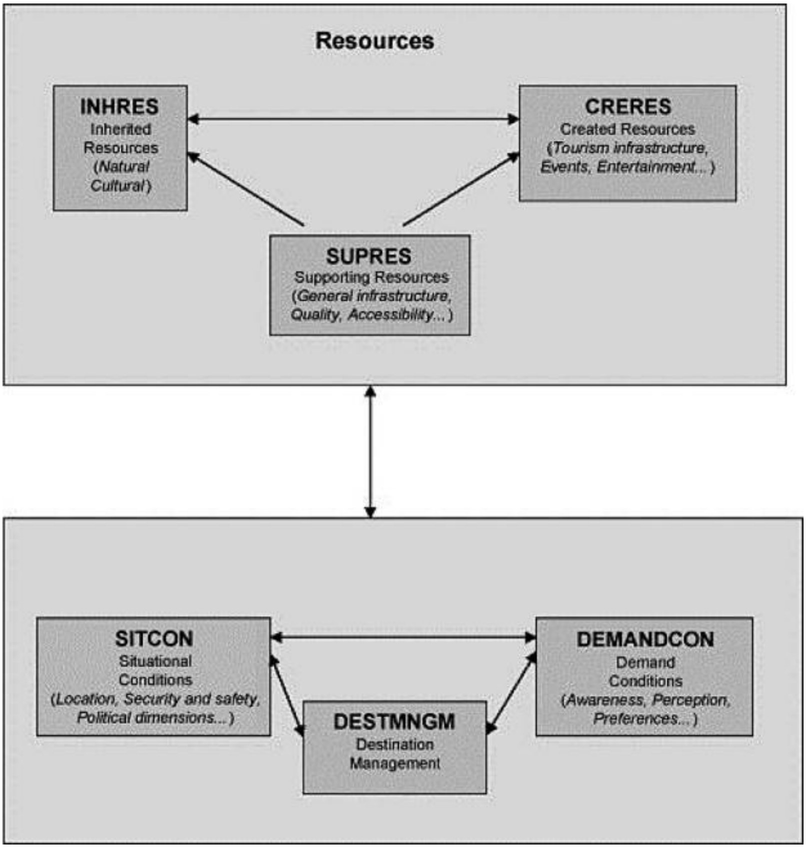

Figure 1. Dwyer and Kim's integrated model of destination competitiveness

these studies suggested that further research should be conducted to identify the relative importance of the different determinants of competitiveness within the context of specific destinations and specific visitor market segments (Gomezelj and Mihalic, 2008, 2008b) and the importance of different elements of destination competitiveness in increasing the number of tourists from different market segments (Dwyer and Kim, 2003). By unveiling the determinants that define the competitive position of rural tourism in Uruguay and by understanding the customer profile of potential German rural tourists, this paper has addressed some of these gaps.

Unlike Crouch and Ritchie's (1999) model, Dwyer and Kim's (2003) model explicitly recognises demand conditions as an important determinant. The authors claim that focusing only on the supply side gives an incomplete picture of destination competitiveness. They believe that understanding the interrelationship between consumer preferences and destination attributes will support tourist stakeholders to make informed decisions to enhance the competitiveness of the sector. Destination competitiveness is seen by Dwyer and Kim (2003) as an intermediate goal and a pre-requisite for achieving regional or national prosperity. The Integrated Model can help to reveal and address pull factors. Thereby, bilateral tourism flows can be increased over time.

Similar to Crouch and Ritchie's (1999) model, Dwyer and Kim's model incorporates the micro and macro perspective to identify the underlying key success factors of a destination's comparative and competitive advantage using both subjective and objective measures. The latter includes variables such as visitor numbers, tourist expenditure, market share and employment, whereas the former include variables such as the richness of culture and heritage or the quality of the tourism experience. The revealed weaknesses of a tourist destination could be addressed by industry and government strategies. It is important for the educed strategy to be tailored to a specific tourist destination because the successful implementation of a chosen strategy depends – as mentioned by Alavi and Yasin (2000) – on the specific stage, development or evolution of the tourist destination.

Heath (2002) developed a model of destination competitiveness aimed at enhancing tourism competitiveness in South Africa. The model incorporates the main indicators of destination competitiveness proposed by Crouch *et al.* (2000) and Dwyer and Chulwon (2001). According to his study, destination competitiveness is based on the following "foundations": key attractors, fundamental non-negotiables, enablers, value adders and experience enhancers.

Other scholars such as, Cracolici *et al.* (2006) looked at the impact of resource efficiency on the competitiveness of a tourist site. These authors suggest that to achieve competitive advantage, the economic efficiency of the tourist destination needs to be compared to the efficiency of a single company within that destination. The idea is to develop strategies to optimise the use of input factors involved in the generation of outputs.

The model to be used in this research must be capable of explaining the success of tourism destinations in attracting international tourists. The general conceptual model of destination competitiveness developed by Crouch and Ritchie (1999) and further refined (Ritchie and Crouch, 2003) is the model that best meets these requirements. This model was selected for several reasons. First, this model has been widely reported in the tourism literature and has been the basis for a large number of other research studies into destination competitiveness. Second, the model is based on at least eight years of research and has been refined and developed over an extensive period. Third, the model has a holistic approach that makes it suitable to be applied to any destination and tourism market. This particular aspect of the model makes it very attractive to conduct – for the first time – an exploratory research of the competitiveness of the Uruguayan agro tourism industry. Fourth, Dwyer and Kim's (2003) framework allows the assessment of destination competitiveness to be evaluated over time in respect to particular types of travellers or by comparison to a particular competitor destination. Therefore, this model will inform the data collection process as well as the analysis of primary data.

This research will also delve into the drivers of customer satisfaction, by identifying the needs and preferences of current and potential tourist markets. Thus, this study shall reveal key success factors, threats and opportunities to improve private and public sector actions within the rural tourism sector to increase the competitive position at a regional and national level.

Consumer's awareness, preferences and perceptions of a specific tourist destination may vary among different visitor market segment visiting the country. Therefore, tourists could be segmented by country of origin or any other demographic characteristics to reveal the expectations, motivations and preferences of those selecting Uruguay as a rural holiday destination. The Integrated Model of Destination Competitiveness helps to evaluate destination competitiveness between countries by unveiling those factors that influence the tourist decision making process in selecting a particular destination. The model helps to assess the underlying strengths and weaknesses of different travel destinations providing the necessary data for governments and industry to adjust their tourism strategies to improve tourism numbers, expenditure and socioeconomic prosperity.

Methods

A positivist, deductive research approach was deemed the most appropriate approach to address the objectives of this research. The application of a well-known framework to the Uruguayan rural tourism sector has helped to identify the competitive position of Uruguayan firms within the selected industry. Two structured questionnaires were developed to collect the data, one administered to Uruguayan key rural tourism stakeholders, and another one to potential German tourists. A total of 185 questionnaires were completed. To establish validity, questionnaires were scrutinised by a panel of experts in the field. Prior to data collection, both questionnaires were pre-tested (using a pilot test) on a total of 20 additional participants and some corrections were made. Because none of the questionnaires contain socially sensitive items, the impact of social desirability bias was not considered.

The first questionnaire was administered to 76 Uruguayan rural tourism stakeholders with knowledge or experience relevant to the topic. This research strategy recognises that gathering data from rural tourism stakeholders who have spent time addressing the challenge of what makes a destination competitive, can provide an invaluable starting point for an analysis such as this. Three groups of experts were targeted: owner-managers of rural tourism establishments (64 per cent) – mainly tourist farms and ranches – rural tourism associates (22 per cent) and tourist agencies managers (14 per cent). The sample was integrated by 55 per cent men and 45 per cent female participants. The sample size is the suggested to get results that are representative (with 95 per cent confidence level) of the universe of Uruguayan rural tourism farms.

Participants were required to make judgements regarding the importance of the main factors and sub-factors detailed in the Crouch and Ritchie model of destination competitiveness. Respondents were asked to rank different Uruguayan competitiveness parameters against a five-point Likert scale, comparing Uruguay against its main competing tourist's destinations: Argentina and Brazil. The options given in the Likert scale ranged from 1 (well below average) to 5 (well above average). The data were then categorised within the six categories of the "Integrated Model". The collected data were transferred to GenStat for statistical analysis. This data analysis tool is suited to the aims of this study which aimed to identify the importance of the attributes of destination competitiveness.

Table I below shows the location of the tourist establishments and geographic areas where the questionnaire was carried out. The criteria used to determine the sampling frame (for selecting the tourist establishments) was based on: existence of a homepage, Web site quality, total product offer, activities in the surrounding area, price, location and proximity to main roads. The chosen tourists' farms are distributed all over the country, and therefore, it could be said that the results are a fair representation of the rural tourist industry in Uruguay.

The second questionnaire was administered to a convenience sample of 109 potential German tourists. This is a non-probability sample, and therefore, the findings could not be generalised to the entire German population. However, the study used the right sample size to get results that are representative of potential tourists attending "The Equitana fair" with a 95 per cent confidence level. The sample is not truly random because this research is only interested in the population of German tourists that are interested in rural tourism. Therefore, the questionnaire was intended to collect the required data to examine the preferences and customer profile of potential German tourists looking for rural holidays in developing countries such as Uruguay. Once the expectations, needs and wants of this tourist market have been determined, this information will be confronted with the results of the Uruguayan market analysis.

This questionnaire had two main parts. The first part aimed at revealing the attractiveness of Uruguay as a rural destination and the second part looked at the general characteristics of German tourists. The Equitana fair event, held in Essen Germany was recommended by travel agencies – supplying services to people

Table I.
Rural tourism establishments where the questionnaire was carried out

No. of establishments	Department	Location
3	Paysandú	North west
1	Rio Negro	West
1	Tacuarembó	North east
1	Soriano	West
2	Colonia	West
3	San Jose	South
1	Treinta y Tres	East
2	Rocha	South East
1	Maldonado	South

interested in rural tourism – as the most suitable event to collect data from potential German tourists interested in rural tourism. It is a nine-day event attracting over 207,000 visitors, located in Germany's most economic and populous region (Reed Exhibition, 2011). Moreover, the high number of visitors with the right profile for this research and the presence of a Uruguayan exhibition stand were important factors considered when selecting this fair to conduct the survey. To recruit a sample that adequately represents the target population, potential participants were informed about the aims of the study. Only those participants interested in rural tourism were administered a questionnaire. These respondents come from different regions of Germany as depicted in Table II. This study is aimed at identifying the profile of potential German tourist interested in rural tourism in Uruguay. Therefore, this paper only looks at collected data from German respondents.

Results

Competitiveness of the Uruguayan rural tourism sector

In this section, the data collected from questionnaire one are presented against the main six competitiveness determinants suggested by Dwyer and Kim (2003).

Inherited resources. Results from this study indicate that Uruguay as a rural tourism destination is well positioned compared to its South American competitors (overall grade 3.95 of 5) in most of the attributes within this group (Table III). Whereas *natural inherited resources* are graded with an overall mean score of 4.20, *culture and heritage* only attained an overall mean score of 3.74. The highest rating in this group of indicators was assigned to the *country's unspoiled nature* (4.70), whereas the lowest score was assigned to the *level of cleanness and sanitation* with only 3.80 points. For these two factors, a low standard deviation (0.41/0.45) indicates a high level of agreement between the respondents. However, a high standard deviation of 0.93 indicates that respondents did not agree about the attractiveness of the Uruguayan climate. This might be related to the different locations of targeted rural tourism establishments. The climate in Uruguay varies across different parts of the country. Generally, the northern provinces have warmer weather compared to the southern provinces.

Created resources. There was much agreement among respondents about a slight superiority of Uruguay's created resources compared to its counter rivals from Argentina and Brazil (Table III). Within this dimension, most of the indicators depicted similar values. Results indicate that Uruguay's main strengths lie in its *airport efficiency*

Federal sates	Participants (in %)
Schleswig-Holstein	2.4
Hamburg	1.2
Niedersachsen	7.2
Nordrhein-Westfalen	51.8
Hessen	12.0
Rhineland-Pfalz	9.6
Baden-Wurttemberg	9.6
Bayern	1.2
Saxony-Anhalt	1.2
Brandenburg	3.6

Table II. Geographic origin of German participants by state

		Mean	SD
	Attractiveness of climate to German tourists	4.00	0.93
Natural endowed resources	Cleanness/sanitation	3.80	0.41
	Marvels of nature	4.20	0.77
	Flora and fauna	4.40	0.61
	Unspoiled nature	4.70	0.45
	National parks	4.10	0.70
	Overall	4.20	0.65
Cultural/heritage endowed resources	Historic sites, heritage and museums	3.71	0.80
	Artistic and architectural features	3.43	0.49
	Traditional arts	3.89	0.77
	Variety and quality of cuisine	3.93	0.59
	Overall	3.74	0.66
Endowed resources		3.95	0.66
Tourism infrastructure	Airport efficiency/quality	4	0.85
	Tourist guidance and information on rural tourism attractions	3.25	0.73
	Local tourism transportation efficiency/quality	3.43	0.98
	Visitor accessibility to natural areas	3.64	0.89
	Food service facilities	3.93	0.7
	Overall	3.66	0.83
Range of activities	Waster based	3.43	0.82
	Nature based	4	0.65
	Adventure activities	3.43	0.82
	Recreational activities	3.86	0.64
	Sports facilities	3.71	0.8
	Overall	3.69	0.75
Shopping	Diversity of shopping experience	3.79	0.86
	Quality and variety of shopping items	3.64	1.11
	Value for money in shopping items	3.29	0.88
	Overall	3.57	0.95
Entertainment	Entertainment quality/quantity	3.71	0.72
	Nightlife	3.64	0.83
	Overall	3.68	0.76
Special events		3.86	0.76
Created resources		3.69	0.81
General infrastructure	Accessibility of destination	3.50	0.73
	Health/medical facilities to serve tourist	3.43	1.05
	Financial institutions/currency exchange facilities	3.86	1.06
	Telecommunication systems for tourists	4.21	0.67
	Security/safety for visitors	4.57	0.62
	Electricity supply in rural areas	4.00	0.85
	Overall	3.93	0.83
Quality of service	Quality of rural tourism services	3.93	0.59
	Monitoring of visitor satisfaction	3.69	0.72
	Service quality and visitor satisfaction	3.77	0.58
	Training programmes and service quality	3.15	0.36
	Overall	3.64	0.56
Hospitality	Hospitality of residents towards tourists	4.64	0.61
	Quality in performing rural tourism services	3.93	0.59

(*continued*)

Table III.
Competitiveness determinants

		Mean	SD
	Communication/trust: tourists – residents	4.43	0.62
	Overall	4.33	0.61
Supporting factors		3,97	0.66
Destination marketing management	NTO Reputation	4.00	0.60
	Co-operation between private and public sector	3.08	1.10
	Overall destination image	4.07	0.59
	Development of effective destination branding	3.85	0.77
	Promotional activities of NTOs in Germany	2.77	0.70
	Fit between product preferences	3.33	1.03
	Overall	3.52	0.80
Destination policy, planning and development	Vision for rural tourism development	3.46	0.61
	Vision reflecting tourist values	4.08	0.73
	Vision reflecting resident values	3.85	0.66
	Vision reflecting stakeholder values	3.75	0.60
	Existence of clear policies (rural tourism)	3.08	1.00
	Development/promotion of rural tourism products	3.29	0.88
	Development integrated into overall development	3.36	0.61
	Overall	3.55	0.73
Human resource management	Commitment to tourism/hospitality education	3.00	0.55
	Educational structure/profile of employees	3.14	0.64
	Adequate tourism education programmes	3.29	0.59
	Training responsive to visitor needs	3.21	0.41
	Overall	3.16	0.55
Environmental management	Sustainable tourism development	3.64	0.72
	Environmental and heritage protection	3.85	0.77
	Overall	3.75	0.77
Destination management		3.50	0.66
Competitive (micro) environment	Domestic business environment	3.29	1.10
	Access to venture capital	3.00	0.76
	Level of co-operation (rural establishments)	3.67	0.62
	Use of IT by firms	4.00	0.68
	Use of e-commerce	3.92	0.73
	Overall	3.58	0.78
Competitive (macro) environment	German business environment	4.42	0.49
	Political stability	4.25	0.67
	Quality of research input	3.29	0.59
	Extent of foreign investment	3.50	0.91
	Overall	3.86	0.67
Price competitiveness	Value for money in destination tourism experience	3.64	0.72
	Value for money in accommodation	3.57	0.82
	Overall	3.61	0.77
Situational conditions		3.68	0.74
Demand conditions	International awareness of destination	3.15	0.66
	International awareness of destination products	3.15	0.66
	Overall situation for rural tourism in Uruguay	3.08	0.73
	Overall	3.12	0.68
Demand factors		3.12	0.68

Table III.

and quality as well as its *nature-based activities*. Germany is not connected to Uruguay by direct flights but to Argentina and Brazil. There are many options to travel to Uruguay from Argentina or Brazil. Nevertheless, if Uruguay was able to offer direct-flights to potential German visitors, the country's accessibility could be further improved, and Argentinean's and Brazilian's competitive advantage resulting from being directly connected to Germany via non-stop flights would lose importance.

Within this group of indicators, *recreational activities* such as special events and festivals that take place in Uruguay are rated above average, with a mean score of 3.86. This suggests that Uruguay is more competitive on this area than the competitor destinations. The standard deviation reveals that most participants share this opinion.

Although created resources look promising for the future of Uruguayan rural tourism sector, standard deviation divergences need to be considered, and therefore, results should be interpreted with appropriate caution.

Supporting factors. Uruguay is considered to be more competitive than its direct rivals in most of the supporting factors, with most attributes rated higher than three, as shown in Table III.

Under supporting factors, the questionnaire asked respondents to rank the level of funding/support available to develop the German market. This information is not included in Table III, but it is interesting to note that only 57 per cent of all participants felt capable of answering this question. The majority of these respondents stated that they were not aware of any support available for developing the German market, 22 per cent of participants could not give an answer and the remaining 21 per cent stated that market ties with Germany do not exist.

The rating of supporting factors indicates that the main competitive advantage of Uruguay as a rural tourist destination lies in the *hospitality from residents towards tourists*, which contributes to a positive experience while staying in Uruguayan farms. Supporting factors together with inherited resources have the highest average mean scores of 3.97 and 3.95, respectively, suggesting that these are the two main determinants of Uruguay's favourable competitive situation. The vast majority of respondents agreed with the significance of these competitiveness determinants, which is reflected in the relatively low levels of standard deviation (0.66) for each factor. While some supporting factors are perceived as good or very good compared to competing countries, the *quality and quantity of training programs* to enhance service quality has a low rating, with a mean score of 3.15. A standard deviation of 0.36 – the lowest in this research – indicates that there is large agreement among participants. This indicates that this is an area where adjustment needs to be made to improve the competitive position of the sector.

Some supporting factors, such as *electricity supply* or *medical facilities*, show high standard deviation values (above 1). These results may be affected by the existing differences between geographical areas where this research was carried out. In Uruguay, services are not uniform across all areas of the country. Some provinces are more developed than others, and therefore, they have better access to services.

Destination management. The results indicate that most respondents agree on the perception (SD: 0.55) that *human resource management* is one of the key factors limiting a further development of the selected industry. With a mean score of 3.16, *human resource management* is clearly below the average group mean score at 3.50. This low rating reveals that for this indicator, Uruguay does not differ much from its main competitors.

Results from the other groups of indicators within destination management are rated higher than human resource management. However, within the group of indicators for "destination policy, planning and development", the *existence of clear policies in rural tourism* scored particularly low. This might be another weakness of Uruguayan rural tourism, but it has to be noted that the high standard deviation (SD: 1) reveals a high dissonance among tourism stakeholders. Yet, some feel very strongly about this issue, and they are of the opinion that policies in rural tourism need further development. The indicator with the lowest rating within this dimension is *the promotional activities of national tourist organisations in Germany*, with a rating of 2.77, which shows that is the only indicator where Uruguay is clearly perceived to be less competitive than its direct rivals.

Situational conditions. Factors within this determinant can form the basis of competitive advantage in attracting tourist to Uruguayan rural farms. The overall ranking is positive, but particularly, the *German business environment* factor has been rated very high by the majority of respondents. As shown in Table III, *political stability* is another area where Uruguay has a clear competitive advantage against Argentina and Brazil, with a rating value of 4.25. This area is a key factor for a competitive destination. However, this study has also identified the following areas where Uruguay is perceived to be less competitive: *quality of research input*, *access to venture capital*, *domestic business environment* and *foreign investment*.

Demand conditions. Dwyer and Kim (2003) argue that demand conditions are influenced by the *international awareness of the destination and its products*. The findings from this research suggest that the international awareness of Uruguay as a key rural tourist destination is similar to those of its direct competitors. A low standard deviation (SD: 0.66) indicates a strong agreement among all respondents.

Consistency of results across different sub-groups. This section examines whether participant's perception of Uruguay's competitiveness was influenced by the number of years respondents have been working for the rural tourism sector and by respondents' occupational categories. For this purpose, the respondents were divided into sub-groups, and the results from the different sub-groups were compared. First, respondents were divided into two sub-groups based on the years of work experience: less than 10 years and more than 10 years of experience within the industry. Second, respondents were divided into three sub-groups based on the following occupational categories: working in rural tourism establishments, in rural tourism associations or in travel agencies. This categorisation shall help to evaluate whether the results are influenced by the type of organisation in which the participants work. Figure 2 summarises the research findings.

In the above figure, RE refers to rural establishments, RTA to rural tourist associations and TA to tourist agencies.

The comparative analysis suggests that results obtained from the group of participants with more than 10 years of work experience within the rural tourism industry had a more positive perception of Uruguay's competitiveness in relation to each competitiveness indicator than the group of participants with less than ten years of experience. The former group of participants perceives *supporting factors* as the main source of competitive advantage and the *destination management* as the weakest

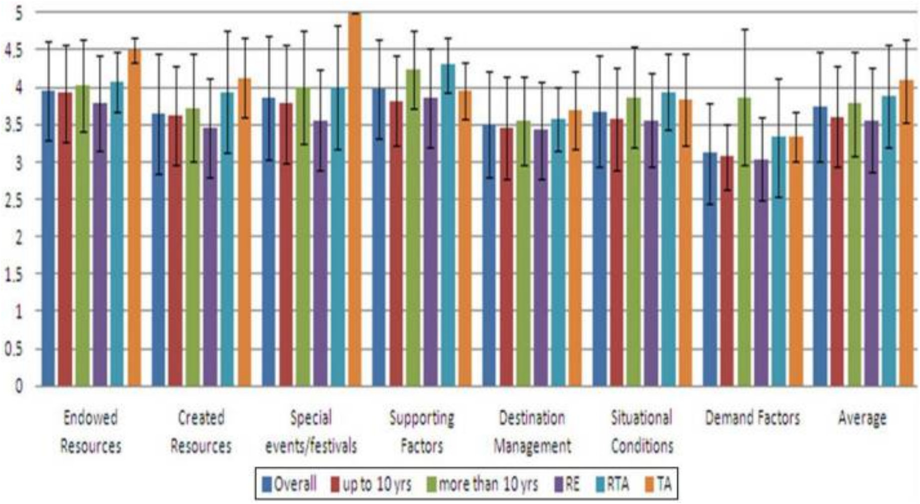

Figure 2.
Comparison of the research findings made in different sub-groups

determinant of destination competitiveness. The latter group considers *endowed resources* as the main reason for the high level of competitiveness of the Uruguayan rural tourism offer. *Demand factors* were rated as the weakest point. The results obtained from those participants with more than ten years of work experience within the sector are consistent with the overall research findings.

The comparative analysis of the results obtained from the three groups of participants with different occupational categories revealed interesting results. Those working in tourist agencies gave the highest average mean score (4.09) to the competitiveness indicators for Uruguayan rural tourism sector, followed by those working in rural tourism associations (3.88) and finally those working in rural establishments (3.60). For those working in rural establishments, *demand factors* are limiting the competitiveness of the sector while *supporting factors* are in their eyes the most contributing factor to Uruguay's rural tourism competitiveness. Although the valuation is in accordance with the overall rating (only the rating for special events and festivals and situational conditions is different), it is yet slightly lower than the overall rating. Respondents from rural tourist associations perceive *supporting factors* as the main strength of Uruguayan rural tourism's competitiveness and *demand conditions* as the main weakness. The results from this group are in line with the overall rating.

Participants from travel agencies rated Uruguayan's competitiveness above the overall average. According to them, competitive advantage is based on *special events and festivals*, whereas the main weakness is considered to be *demand factors*. When the results from these subgroups are compared, the rating of special events and festivals exhibits the highest standard deviation. This reveals the ambiguity that exists among participants from different sub-groups. The standard deviation for all other determinants is relatively low, within the range of 0.15 to 0.28 which reveals a relatively high level of accordance.

Profile of potential German tourist

This section will present the findings from the questionnaire carried out to German respondents at the Equitana fair held in Germany in 2011. This part of the study is aimed at identifying the profile of potential German tourist interested in rural tourism in Uruguay, and assessing Uruguay's potential to attract this tourist market.

General characterisation of participants. Results indicate that 70 per cent of participants travel with their partners. Within this group, 33 per cent also travel with kids. Interestingly, not all parents take their kids on holiday with them. Among the remaining participants, 19 per cent tend to travel with friends and 11 per cent travel alone. Most participants (65.06 per cent) stated that relaxation and leisure was their prime motivation for travelling followed by sport and adventure (24.01 per cent), culture (8.43 per cent) and finally social reasons (2.40 per cent). The data collected indicate that, on average, a German tourist would spend €1,000 per week. Most respondents indicated that they tend to plan their holidays at least half a year in advance.

Despite the lack of knowledge about Uruguay – as a rural tourist destination – 71.08 per cent of respondents would consider travelling to Uruguay on a holiday. However, 9.63 per cent of respondents claimed they would not consider travelling to Uruguay. The remaining 19.28 per cent would "eventually" choose Uruguay as a holiday destination. It is important to note that ten participants had already been to Uruguay, and all of them would like to return to Uruguay in the near future. Among those who would not consider Uruguay as a potential destination, the 13 hours flight was identified as the main factor that would discourage these potential tourists from visiting Uruguay. The study also reveals that those who would not select Uruguay as a tourist rural destination tend to spend less money than the rest of the respondents. A long and expensive flight would probably discourage those tourists on a budget.

Results from this study show that the travel patterns of those Germans willing to select Uruguay as a rural destination can be broken down as follows: 50.85 per cent travel more than once a year, 35.60 per cent travel once a year, 3.39 per cent travel every other year and 10.17 per cent travel less frequently. Most participants (69 per cent) who considered Uruguay as a potential rural tourist destination would like to stay in the country for about three weeks (19.36 days). Also, 91 per cent of respondents would like to complement their Uruguay experience with a short visit to Argentina and Brazil.

Participants declared that they gather information about travel destinations from the Internet (26.05 per cent), friends and relatives (22.33 per cent), tourism catalogues (13.03 per cent), newspaper (11.16 per cent), television (10.70 per cent), tourist agencies (8.37 per cent), magazines (5,12 per cent) and newsletter (3,26 per cent). When asked about their preferred way of receiving information, the ranking was clear: 39.81 per cent opted for information sent by email, 29.13 per cent for information sent by post, 25.24 per cent are happy to search for information on Internet and only 5.82 per cent like to receive newsletters.

Most of the respondents (95 per cent) who expressed their desire to travel to Uruguay were very interested in participating in some of the activities offered by Uruguayan touristic farms. Table IV below depicts the ranking of participants' activity preferences. Interestingly, even non-horse riders (one being the exception) would like to enjoy horseback riding and participate on typical gaucho's activities. Most participants (91.07 per cent) were very enthusiastic about the idea of participating in several days trail rides.

The results shown in Table IV indicate that riding and cattle driving were the two most preferred activities among Germans looking for a rural holiday. Only 33.93 per cent of participants consider that the existence of a swimming pool would influence their destination choice. For the remaining respondents, the presence or absence of a swimming pool was irrelevant for their destination selection process.

Discussion

Overall, compared to its main regional competing destinations, Argentina and Brazil, Uruguay does not possess a very strong comparative position. However, tourism stakeholders on the supply side rated Uruguay's *natural endowed resources* and *hospitality* as the most competitive indicators. The authors believe that Uruguayan respondents have underestimated the marvels of nature that attract international tourists to competing destinations such as Argentina or Brazil. Compared to Argentina or Brazil, Uruguay does not possess natural highlights such as the Iguassu Waterfalls and the isolated lands of Patagonia in Argentina or the beautiful Brazilian beaches. Yet, Uruguay is still rich in natural resources and beautiful landscapes, and therefore, a certain level of touristic activity could still be achieved. To overcome the lack of marvels of nature, Uruguay should concentrate on adding value through offering high standard accommodation, excellent hospitality and service and excellent marketing.

The small size of Uruguay should not be considered a competitive disadvantage. On the contrary, it could be a strong selling point because within small distances, different sceneries and features can be explored, different activities can be experienced and it is possible to explore most of the country in a single holiday.

The findings suggest that Uruguay will have to create and convey the right message focussing on the range of activities offered in rural farms and their surrounding areas. The distinctive experiences that Uruguay may offer need to correspond to the experiences that German tourists would like to enjoy. The results from this study indicate that German respondents are mainly interested in getting involved in cattle drives and horse riding.

The high level of correspondence between the profile of German tourists and the characterisation of nature-based and adventure tourists has revealed the significant potential of Uruguay as a rural tourism destination for Germans looking for nature and soft-adventure tourism. However, results indicated that Uruguay is less competitive in offering adventure activities and water-based activities than other sort of activities. This is not surprising as Uruguay is not endowed with mountains or wild rivers which are necessary for hard adventure tourism activities such as rock climbing, canoeing or

Activity	Rank	Level of participation
Riding	1	98.21
Cattle drive	2	87.5
Branding	3	71.43
Walks	3	71.43
Biking	4	55.36
Drilling/harvesting	5	42.86
Polo	5	42.86
Fishing	6	17.86

Table IV.
Participants' activity preferences

white water rafting (The Adventure Travel Trade Association, George Washington University and Xola Consulting, 2010). Therefore, the country is not a prime tourist destination for extreme adventure travellers. Although the rating on this area was low, there is a potential to improve water-based activities. A loan from the IDB would be the starting point to support entrepreneurship, private investment and promote tourism in six water-rich Uruguayan departments.

The high *level of security* and the *peacefulness* that characterise Uruguay's rural areas are highlighted in the literature and are accredited with Uruguay's high fidelity level (Cotelo, 2011). This high fidelity level has been confirmed with the help of the data collected from German participants. The level of security of a country is a key factor for Europeans choosing developing countries as a tourist destination. Therefore, tourism stakeholders should capitalise on the excellent security levels of the country.

This study also recommends improving the indicators that are responsible for the relatively poor rating of destination management. For instance, it is necessary to establish a good educational system especially for participants on the supply side of rural tourism. To achieve this, it would be recommended to directly involve the government in the creation of specialised human resources. Public university programmes need to be carefully reviewed, and the government must ensure that graduates have the skills to enter the tourist industry.

This study has also identified opportunities where the public and private sector can work together to improve the competitiveness of Uruguayan rural tourism. The areas on which both sectors should focus on are promotional activities in Germany, the development of clear rural tourism policies and a better integration of the sector into the country's development strategies. Currently, a vast number of private and bureaucratic public institutions within the rural tourism sector have limited the possibilities of effective coordination and collaboration among tourism stakeholders. In Uruguay, the cooperation indicator between private and public sector was only 3.08 revealing a deficit in communication. The lack of communication between private and public institutions needs to be addressed by the Ministry of Tourism.

Results from this study indicate the need to develop more appropriate marketing strategies. The data collected from this study revealed that German tourists are aware of the ample gamut of tourist attractions that Argentina and Brazil have to offer. This is not the case for Uruguay, as many respondents were not aware of what Uruguay as a tourist destination has to offer. To enhance the awareness of Uruguay as a rural tourism destination, and the appeal of the core resources and attractors, destination management needs to be improved. This represents an opportunity for the public and private sector to identify the best channels to communicate the main benefits and strengths of Uruguayan rural farms to potential tourists. This could be achieved through international marketing activities aimed at targeting potential tourists at fairs such as the Americana in Augsburg or the Pferd and Jagd in Hannover. These fairs attract a European clientele interested in rural tourism and are characterised by a high buying power. Uruguay should capitalise on recent positive feedback and facts such as being voted one of the most attractive destinations by National Geographic in 2011 and being included on several articles on attractive tourist destinations written by the New York Times. For instance, the New York Times listed Colonia del Sacramento, a Uruguayan province, among the 41 places to visit in 2011(Solo Turismo, 2010; The New York Times, 2011). The Ministry of Tourism should allocate some funds to promote

Uruguayan rural tourism abroad and to help domestic organisations to identify potential markets – such as Germany – and target them accordingly.

The rural tourism sector has not benefited from any tax reductions that traditional sectors of tourism in Uruguay have enjoyed in the past. Considering the potential of rural tourism to improve the economic situation of rural areas, the government should consider implementing tax incentives to help rural farms to improve their competitive advantage. If rural farms attract more foreign tourists, it could have "spill over" benefits for many people in surrounding areas. Tax benefits would also help the rural tourism sector to offer a more competitive product which will help to attract price-sensitive tourists such as Germans. However, tax reductions need to be carefully considered as the government requires a certain level of taxes to meet its social responsibilities and investments in the community.

Limitations and considerations for future research

The competitiveness of the Uruguayan rural tourism sector is assessed by analysing data from experienced Uruguayan tourism's stakeholders. The rationale of this research approach has been discussed above. The limitation of such approach is that collected information might be subjective and subject to distortion and bias.

To gaining a better understanding of the competitiveness of the selected industry, it would be advisable to replicate this study in Argentina and Brazil. This would allow confronting the outcomes of this study against expert knowledge from tourism stakeholders from competing destinations. For instance, the Multi-Criteria Decision Analysis method ELECTRE I could be applied to the three countries selected by this study. This method has already been applied to four Hawaiian Islands to analyse tourism destination relative competitiveness (Botti and Peypoch, 2013).

Extending the study to other fair events in Germany would have made the results of this study more generalisable. To gain a deeper understanding of German demand for tourism in Uruguay, further investigation on German tourists on the farms is necessary.

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