

**NIGERIAN TOURISM INDUSTRY AND GLOBAL COMPETITIVENESS:
CONSTRAINTS AND OPPORTUNITIES**

Ekeke, J.N¹

**** Olori, W.O.**²

¹Department of Hospitality Management & Tourism,

²Department of Management

University of Port Harcourt, Choba,

Rivers State, Nigeria.

** Corresponding author: oloriwilliams@yahoo.com

Abstract

Despite the numerous calls and studies aimed at enhancing the Nigerian tourism industry for socio-economic sustainability, growth seem lacking as the country was ranked 129 among 140 nations of the world in the Travel and Tourism Competitiveness Index 2019. This result suggests that Nigeria is yet to gain competitive advantage in the global tourism trade. This present study seeks to examine the country's competitive disadvantage through the prism of Porter's (1990) Diamond Model. The study analysed each of the four determinants of the Porter's diamond model to highlight degree of contribution of each of the determinants to the competitive disadvantage of the tourism industry in Nigeria. The study proposes academic, stakeholder and marketing implications for the study.

Keywords: Tourism. Competitive disadvantage. Diamond model. Sustainable Competitive advantage

1. Introduction

The tourism industry is characterized by intensive competitiveness among tourism destinations at the global level. Several countries of the world such as Spain, France, Germany, Japan, the United States, the United Kingdom, Australia, Italy, Canada and Switzerland which make up the top ten scorers on the 2019 Travel and Tourism Competitiveness Index (TTCI) are seen to be benefiting from the global tourism trade greatly (World Economic Forum, 2019). The success story of these nations is traceable to their ability in making tourism part of their developmental strategy (Milne, 2001).

At the core of the study is the sixth edition of the Travel and Tourism Competitiveness Index (TTCI). The aim of the TTCI, which covers a record of 140 economies in the year

2019, is to provide a comprehensive strategic tool for measuring the “the set of factors and policies that enable the sustainable development of the Travel & Tourism sector, which in turn, contributes to the development and competitiveness of a country.” By providing detailed assessments of the T&T environments of countries worldwide, the results can be used by all stakeholders to work together to improve the industry’s competitiveness in their national economies, thereby contributing to national growth and prosperity. It also allows countries to track their progress over time in the various areas measured (WEF, 2019).

The Nigerian tourism industry is characterized by low capacity utilization despite the fact that tourism is described as the fastest growing industry at the global level. Based on the travel and tourism competitiveness report by the World Economic Forum (WEF, 2019), Nigeria is occupying the 129th position out of 140 nations evaluated (WEF, 2019, Xiii) while the island nation of Mauritius occupied the 54th position and South Africa occupied the 61st position. In the Sub Saharan African chart, Nigeria occupies a distant 25th position out of 34 nations. The tourism industry in Nigeria is variously described as an under-utilised sector owing to its inability to convert the vast tourism resources in the country into tourism product for touristic consumption.

It should be noted that, the sustainable development of the tourism industry will enhance the destination competitiveness of the nation through the achievement of capabilities in tourism product development and marketing and the stimulation of the tourism value chain. This will engender tourists’ inflow with its attendant socio-economic development through the multiplier effect associated with economic activities of tourism. With a contribution of less than 1% by tourism to the national Gross Domestic Product (GDP) (Central Bank of Nigeria Statistical Bulletin, 2013) the country will witness a significant contribution of tourism to the economic development of Nigeria through job opportunities, improved standard of living, economic diversification, etc.

There are several models (Tourist area life cycle model, Bulter, 1980; National Diamond Model Porter, 1990; Destination competitiveness model, Crouch & Ritche, 2000; and Integrated destination competitiveness model, Dwyer & Kim , 2003), in extant literature that authors have utilized in the conceptualization of destination competitiveness. In some empirical studies, these models have helped to facilitate the process of identifying, analyzing measuring and evaluating the competitiveness level of a tourist destination. For example, Armenski, Gomezelj, Djurdjev, Curcic, and Dragin, (2012) used Dwyer and Kim's (2003) Integrated destination competitiveness model to carry out a comparative study between Solvenia and Serbia; and Kharub and Sharma (2016) measured the competitive advantage of MSMEs in India using Porter's Diamond Model.

Prior studies (Adekiya 2016; Bankole, 2002; Nabube & Akahome 2017; Akighir & Aaron 2017; Bankole 2013; Orekoya 2018; Ndanusa, Harad & Islam 2014; Esu 2015) had examined the Nigerian tourism industry with emphasis on identifying the challenges mitigating the development and marketing of tourism in Nigeria. However, no study to our knowledge has examined the Nigerian tourism industry within the context of any of the tourism destination competitiveness models. It is on the basis of this understanding that this study sought to examine the Nigerians tourism competitive disadvantage through the prism of Porter's Diamond Model. .

To achieve the objective mentioned above, the study is presented in three principal sections. The first section describes the theoretical background of Porter's model and the tourism industry. The second section utilized Porter's model of nation's competitive advantage to identify the present status of the Nigerian tourism industry by analyzing the competitive disadvantage of the tourism industry with regard to each determinant in the second section. Finally, various implications (academic, stakeholder and marketing) of the study are defined. The findings of the study will provide an insight for improving the destination competitiveness of Nigeria.

2. Destination Competitiveness

Mulec, (2010, p.14) stated that, “with tourism being increasingly recognized as a key economic opportunity around the world, competition among countries and regions for a fair share of global tourism expenditure is increasing by the day”. When condensed, the views of several authors (such as Crouch & Ritchie, 1999; Ritchie & Crouch, 2003; Dwyer & Kim, 2003) points to the fact that destination competitiveness, describe the ability of a destination to create value added services to the satisfaction of visitors and thus increase national wealth through the management of assets, processes, and attractiveness of a destination on a sustainable level. Destination attractiveness is critical to its competitiveness because it constitute the primary elements or attributes of a destination that act as pull factors that draw visitors to a destination (Kim & Lee, 2002). Destination attractiveness was defined by Mayo and Jarvis (1981, p.201) as “the relative importance of individual benefits and the perceived ability of the destination to deliver these individual benefits”. The quality of attractions, infrastructure, services and quality of people rendering service in a destination defines the ability of destinations mentioned in the definition by Mayo and Jarvis. This implies that the quality of destination attributes is what lays the foundation for destination competitiveness.

To achieve and maintain an appreciable level of destination competitiveness, Owiyo, Mulwa, and Kemboi (2019) argues for continuous and responsible destination management. The authors based their position on the fact that achieving competitive advantage needs appropriate management of destination attractors and support resources with a view to creating differentiation and not only the capability of a destination to attract tourists. Put differently therefore, it is one thing to attract visitors to a destination and another thing to delight the visitors with superior value in terms of memorable tourism experiences.

Armenski, et al (2012) conducted a comparative study between Slovenia and Serbia to determine the degree of destination competitiveness and elements that affect competitive position of a tourism destination. This study utilized the integrated model of destination competitiveness of Dwyer and Kim (2003). The findings of this study showed that Slovenia and Serbia are more competitive in their natural, cultural and created resources. On the other hand, both countries were less competitive in the destination management and demand conditions.

Kharub and Sharma (2016) conducted a descriptive survey to measure the competitive advantage of MSMEs based on the Porter's diamond model framework in India. The result of the study showed that competitiveness among MSMEs was affected mostly by market value.

3. Theoretical Foundations

Porter (1990) postulated the theory of competitive advantage of nations otherwise referred to as the diamond of natural advantage. The author argues that "national prosperity is created; differences in national values, culture, economic structures, institutions and history all contribute to competitive success and nations succeed in particular industries because their home environment is the most forward looking, dynamic and challenging"(Moa, 2011, p.39). Porter (1990) posited that in certain countries of the world, certain firms consistently perform better due to four cardinal attributes of a nation which constitute the diamond of national advantage. The attributes translates to the playing field where each nation develops and sustain for its industries. These attributes are as follows; factor conditions, demand conditions, firm strategy, structure and rivalry and related and supporting industries. The attributes are further discussed below.

Factor conditions: Porter (1990) described the factor conditions that determine nation's competitiveness as physical resources, human resources, capital resources, knowledge resources and infrastructure. The factor conditions are further divided into basic and advanced factor that can either be general or specialized. The basic factors include raw

materials, unskilled labor, water resources and climatic conditions which are bestowed upon a nation by nature and require no further investment, before being utilized in the process of production. On the other hand, the factors that make up the advanced group consist of human resources (skills, abilities and quantity available), physical resources, (quality and quantity available), knowledge resources (such as scientific & technical knowhow, market knowledge), information resources, added capital resources (quality and cost of capital), infrastructure and efficient transportation system). In the context of tourism, physical resources consist of destination attributes such as natural attraction resources (historical sites, flora and fauna, natural parks). These resources represent the primary attractors of visitors to a destination.

Demand Conditions: Demand condition as a determinant of national competitiveness describes the home market and its nature. In the view of Porter (1990) the demand conditions' strength refers to the size of the home market and the maturity level of buyers or the sophistication of buyers in the home country. The composition of the demand conditions at home describes "how firms perceive, interpret and respond to buyer's needs" (Smit 2010 p.116). By implication therefore, a highly sophisticated home market conditions will compel or lead firms to be innovative and possibly update their competitive positions with a view to meeting the high standards in terms of qualitative product and services. Also, a large home market will attract firms who may wish to avail themselves of the market opportunities in such a country.

Related and Supporting Industries: In a particular cluster in any nation, the availability of related and supporting industries is taken as a principal determinant of national competitive advantage (Porter, 1990). As explained by Porter (2000), the activities of related and supporting industry clusters constitute the true sources of competitive advantage. The related and supporting industries include specialized input providers or service providers, various institutions that offer specialized services like the universities that provide training and development services to organizations. As noted by

Smit (2010) a business cluster provides an environment in which learning, innovation and productivity flourish.

Firm Strategy, Structure and Rivalry: The strategy adopted by firms together with its structure, and the rivalry among the firms in a particular country is one of the determinants of national competitive advantage. However, it should be emphasized that the structure and strategies adopted by firms depends to a large extent on the national business environment. This is because most structures and strategies by firms are crafted in response to the environmental forces with a view to availing themselves of market opportunities and mitigating threats.

Government and Chance: The government and chance events are critical factors that influence the above mentioned four determinants of national competitiveness. As noted by Tuna (2006), these two factors combine to play significant functions necessary to compete within the context of Porter's diamond model of national competitive advantage. The government of a particular nation makes policies, laws and regulations that affect the four determinants. The effect may be negative or positive on each of the determinants which in turn will have profound effect on the overall organizational performance.

On the other hand, Chance, consist of certain events or occurrences which are outside the control of the firms as well as the government. The effect of chance events is so profound and therefore capable of reshaping the structure of an industry which may allow the firms to improve its competitive position. Example of chance events include war, epidemic, natural disasters etc. All these are capable of affecting or benefiting a particular country, industry or cluster. For example, the COVID-19 pandemic led to the closure of national economies, as almost all industries were closed down and employees were forced to lose their jobs and remain indoors. On the other hand, manufacturers of personal protective equipment (PPE) and other medical supplies were active in production and marketing.

4. Methods and Materials

Information from secondary sources constituted the bulk of materials used for this current study. The principal source document utilized for the study was the 2019 Travel and Tourism Competitiveness Index report which examined 140 countries by the World Economic Forum(WEF) in collaboration with many valued partner institutes across the world.

5. Results

As stated above, the aim of the present study is to use the Porter's Diamond Model to analyse the position of Nigerian tourism industry with regard to disadvantaged position of Nigeria in the global tourism global market. The findings are presented in line with the determinants of national competitive advantage as advocated by Porter.

Factor conditions

This paper discussed this determinant based on the five factors provided by Porter's (1990) diamond model;

Factor Conditions

i. Physical Resources: Nigeria has many natural attraction sites in almost all the local government areas of the country. They consist of natural wonders, favourable climate and unique wildlife. It is a coastal country and the main attraction for tourists is the pristine beaches and marine activities. Other attractions are historical monuments, exciting trips to tropical forests, exploring wildlife, visiting ancient sites and Nigeria's diverse art and culture. But as noted by the Tourism Development International (2006), the tourism resources are not converted to tourist product and packaged for the marketplace. In a study to determine the influence of destination packaging on tourism performance in Nigeria, Anyasor, Agina, Okocha and Nwankwo (2018), found that destination packaging strategies are inefficient and ineffective in the country. Nigeria is a coastal country and the main attraction for tourists is the pristine beaches and marine activities. Other attractions are historical monuments, exciting trips to tropical forests, exploring wildlife, visiting ancient sites and Nigeria's diverse art and culture.

ii. Human Resources: The future looks very bright for the training and development of human resources required to ensure qualitative employee service in Nigeria's tourism and hospitality industry. This is because there are many universities and polytechnics in Nigeria that are offering Tourism and Hospitality management, at various levels of academic endeavor (National Diploma, Higher National Diploma, Bachelor, Masters' and Doctorate). However at present, hoteliers, fast food restaurant owners are employing staff from different academic backgrounds. In the travel services trade, owners are operating at a small scale with handful of staff even as the owners gain skill and competence through professional training and development. It should be emphasized also that staff wages and salaries are not attractive enough to enhance impressive employee performance which is required for guest satisfaction. Many employees are mainly employed on temporary basis with the effect of high staff turnover rate.

iii. Knowledge Resources: At best, it could be said that the human development activities are not encouraging in the tourism industry in Nigeria. The temporary nature of employment in the hospitality industry cannot give room for much expenditure on training of staff. According to Tourism Development International and United Nations World Tourism Organisation (2006), the Nigerian training institutions are not well positioned for the task due to the fact that they are ill-equipped, non-availability of on-site training facilities, shortage of qualified institutions and teachers. Also NIHOTOUR which is an institution established to train manpower in the tourism industry is said to be ineffective and grossly overstaffed.

iv. Capital Resources: The tourism industry is made up of privately owned businesses and public institutions. As is applicable to other businesses in Nigeria, the high cost of funding by financial institution is disturbing. Small and medium size enterprises find it very difficult to access bank funds as the interest rate goes as high as 30%.

v. **Infrastructure:** As regards infrastructure, there is no good road and rail connectivity with all the states of the federation. The number of airports in Nigeria is sufficient to meet the needs of both international and domestic tourists. But upgrading of some of the airports to meet international standard is required. The sum of 10 billion naira has just been approved by the federal government for an upgrade of Enugu International airport.

Firm Strategy, Structure and Rivalry

The tourism industry is equally a victim of harsh business environment. Also, the Public-Private Partnership (PPP) or relationship required for strategy formulation, implantation and implementation is the Nigerian tourism industry is non-existent (Tourism Development International, 2006). The lack of enabling business environment makes private sector investment and involvement in tourism development a very difficult task. Also, the marketing of Nigeria as a tourism destination is inadequate. However, within the hospitality industry, the rivalry that is visible is between the foreign brands and local brand of hotels. The fast food sector of the industry is expanding rapidly with marketing strategies capable of meeting the needs of both local and international tourists.

Demand Conditions

The tourism market in Nigeria could be divided into domestic market and international market. Another classification could be based on the interest of the tourist; business tourism, leisure tourism and religious tourism. However, the tourism sector lacks vital and reliable statistics as well as market information (TDI/UNWTO 2006). As a result the database required for the implementation of Tourism Satellite Account (TSA) is not available. From the level of development of the attraction sites and the menace of security challenges, it is safe to argue that the international tourist arrivals are not for the leisure market in Nigeria but rather for the business market. The reason being that, the tourist attraction market is not yet developed and are unknown to the international travel trade(TDI/UNWTO 2006).

The domestic demand for tourism in Nigeria is discouraging. This is because majority of Nigerians who have the wherewithal prefer foreign destinations for touristic purposes. It is common knowledge that wealthy Nigerians are busy hosting private parties at foreign destinations. The forgoing implies that the little patronage local recreational parks in Nigeria are receiving now, may be attributed to those who cannot afford foreign trips for recreational activities.

Another critical element of demand condition in Nigeria is the issue and concept of destination image. The awareness and image of Nigeria as a tourism destination in the global tourism market is at best deplorable. It is on record that the United States of America through its consular information sheet for Nigeria with an update almost on yearly basis, portrays Nigeria as a risky place to travel to. One of such consular information sheet as cited in Bankole (2002, p.81) stated in part

“The Department of state warns US citizens of the dangers of travel to Nigeria. Nigeria has limited tourist facilities and conditions pose considerable risks to travellers. Violent crimes, committed by ordinary criminals, as well as by persons in police and military uniforms, can occur throughout the country...”

Related and Supporting Industries

The tourism industry could be described as a great industry consisting of several other industries: transportation, hospitality (accommodation, food and beverage, and entertainment), travel trade, MICE, and attraction, adventure/recreation. The attraction market which lays the foundation for destination tourism marketing is not fully developed (Bankole, 2002). As noted by the TDI/UNWTO (2005, p.9) during their evaluation of Nigeria’s tourism industry, “Nigeria’s historical and cultural sites are in decay and the physical environment is a strategic competitive disadvantage”. The entertainment industry is positioning itself for strategic development while critical

improvement is required in the development of festivals and events into marketable tourism products.

Government and Chance: Tourism has diverse stakeholders consisting of both public and private organizations and individuals as well as the local people. The government has a great role to play in tourism planning, development and marketing. In Nigeria, the government at all levels (federal, state and local) pay more attention to oil generated revenue at the expense of other sources of revenue (World Bank, 2009). However there are moves by the government to position the tourism industry for development and marketing purposes. This started with the government of Chief Olusegun Obasanjo who set up a presidential committee specifically for the development of the Nigeria Tourism Development Master plan by the United Nations World Tourism Organisation (UNWTO). The project which was co-funded by the United Nations Development Programme (UNDP) was subsequently delivered on December 12, 2005 (TDI/UNWTO 2005).

Despite this laudable development, the tourism industry in Nigeria is plagued with several challenges, such as; insecurity, poor infrastructural development, inadequate policies and legislations, dilapidated historical and cultural heritage, kidnapping, limited tourist facilities, high crime rate, lack of funding, lack of amenities such as pipe borne water, electricity, poor promotional efforts, structural imbalances, political instability, lack of tourism statistics, poor maintenance culture, unsafe airspace, endemic corruption, red tapeism, etc (Nadube & Akahome, 2017; Orekoya, 2018; Bankole, 2002; Adewale, 2016). The listed challenges show that Nigeria is yet to be positioned as an attractive destination that is capable of competing with other renowned tourism destinations such as Kenya, Spain, United States, etc.

6. Conclusions

The study examined the tourism competitive disadvantage of Nigeria through the prism of Porter's Diamond Model. Results of the study were gotten from extant literature and it revealed that competitively, Nigeria is disadvantaged in the global tourism trade. The

implication is that, tourism stakeholders in Nigeria should develop a public-private partnership capable of stimulating tourism destination development and marketing initiatives in the country with a view to achieving sustainable competitive advantage.

7. Implications and Recommendations

On the academic side, this study makes a significant contribution to the fact that national prosperity is created through the appropriate use of attributes of a nation to achieve competitive advantage. In the context of tourism development and marketing in Nigeria, the findings of the study provide tentative support to the proposition that development of tourism resources into tourism destination products and provision of destination infrastructure should be recognized as significant antecedents for gaining destination competitive advantage by Nigeria in the global tourism trade.

This paper equally provides practical implications for stakeholders in the Nigerian tourism industry. The government should appreciate the fact that the tourism industry in Nigeria has the capability to generate sustainable revenues that will rival current earnings from crude oil. Consequently they should realize that this feat can only be achieved by building synergy at all levels of government in creating an enabling environment for tourism to thrive on one hand and creating and sustaining strategic collaboration with the private sector tourism service organizations and individuals, with a view to attracting domestic and foreign tourists. Such collaboration, is required between the two sectors before a pathway for tourism development and marketing could be charted. The role of the government in this regard, will include improving infrastructural facilities and creating and sustaining a favourable tourism business environment in Nigeria that is capable of attracting local and foreign investors to participate in this industry.

The government and other stakeholders are expected to create a Destination Marketing Organization (DMO). This body should be charged with the responsibility for destination management and marketing. A public-private partnership is required to make such a body efficient and effective with less political interference from politicians.

This paper equally provides several practical implications for marketers in the Nigerian tourism industry. Firstly, it is essential for all marketers of tourism services in Nigeria to appreciate the fact that tourism is a global trade and by implication all the tourism destinations are involved in an intensive global competition. Closely related to this, is the need for tourism service providers in Nigeria to have a better understanding of destination competitiveness and the elements that affect competitive positioning of a tourism destination. Secondly, the destination marketing organisation if created as argued above should seek appropriate mechanism aimed at converting inherited tourism resources in Nigeria into tourism products. Thirdly, the country could be divided into tourism clusters with a view to stimulating development of regional tourism destinations in Nigeria. This will enhance destination marketing initiatives.

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