



TOURISM IN ALGERIA BETWEEN TERRITORIAL ATTRACTIVENESS AND COMPETITIVENESS OF THE DESTINATIONS

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ABSTRACT

The territorial attractiveness is at the articulation of the competitiveness of the touristic destinations concept. Requiring some introductory explanations, the first correlation, the one between competitiveness and attractiveness, can appear as a truism. To be attractive, a territory must be competitive and vice versa. It is however not that obvious particularly in our case study Algeria, a country with 2.38 million km² -encompassing many façades from the coastline, through the Atlas Mountains, the steppes of the Highlands, to the South with the Hoggar, the Tassili-N'Ajjer, the far southern Sahara, and the Touat Gourara.

An American researcher, Allan A. Lew (1987), established a framework for the tourism "lures". Lew proposed a definition to attractiveness as: "The basic element on which tourism is developed" (Lew, 1987: 554) if we consider the definition of Lew the Algerian territory is extremely attractive while the different indicators of world ranking of Algeria in terms of competitiveness are far from this image, therefore, being attractive does not necessarily mean competitive. This definition brings out a substantial problem, related to the measurement of attractiveness. On what basis can we say that one territory is attractive or that it is more attractive than another? What indicators are used to classify the territories according to their degree of attractiveness?

Through this paper we will present and analyze the various methods and synthetic indicators used worldwide to measure or evaluate the attractiveness and competitiveness of a territory and apply them to our case study.

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INTRODUCTION

In their scientific analyzes of the interactions between tourist attractiveness and competitiveness (LePage and Gollain 2015) have been able to privilege the endogenous attractiveness approach, as it consists to identify the reasons behind the territorial attractiveness. Furthermore, understanding the results of a territory in terms of attractiveness requires external and internal analysis.

These Analysis will help identifying and analyzing the factors of competitiveness that create comparative advantages and will have impact on the attractiveness (presence and quality of infrastructures, human capital, services provided, etc., measure the impact of the external environment (variation of the currency rate, regulation, rate of economic growth, etc.) on attractiveness performance)

This concept has also been studied by other researchers from different fields (economics, marketing, geography, tourism, sociology, etc.) (Ritchie and Zins 1978, Smith 1980, Lew 1987, Smith 1987, Leiper 1990, Nolan and Nolan 1992,

Kim 1998, Deng *et al.*, 2002, Gallarza *et al.*, 2002, Enright and Newton 2004, van der Ark and Richards 2006, Escadafal 2007, Khadaroo and Seetanah 2008; Cracolici and Nijkamp, 2008, Wang and Hsu, 2010, Kusen, 2010, Kim, 2010, Jin *et al.*, 2012). Essentially, the concept of attractiveness of the territory is associated to attributes that compose the territory and make it attractive, whether for living, business, for visit, etc. The attractiveness of the territory can therefore be associated with the attractiveness of its composition and the retention of its population. This concept is not related exclusively to geography, but the territory makes it indivisible.

From a tourist point of view, the attributes that constitute the territory are a set of tangible and intangible attractions that will positively or negatively influence tourists. To be attractive, a territory must be able to provide infrastructure and services that will provide travelers with a remarkable, unique and intense experience. Tourist infrastructure plays a major role in the development of a touristic product. The question of tourism attractiveness can therefore be part of a general reflection on the development of attractiveness through the valorization of resources. "Territorial". These resources can be generic or specific, active or dormant. The valorization processes assume that the tourism business engage in strategies of differentiation by the costs or by the quality of the offer (excluding cost) that

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consider the specificity of the offer and its components. The comparison of the concepts of attractiveness and competitiveness between the economy of tourism and the Geography of tourism reveals the ambiguity of these notions. This observation leads us to clarify these terms and to distinguish several underlying concepts, such as level of amenity or source of amenity. In addition, the reconciliation of these two literatures leads to the idea that attractiveness is likely to influence the location of tourists on two different scales.

From the work of Courlet and Pecqueur (2013), Hatem, (2004), Devereux and Griffith (1998); Among other things, the attractiveness of a territory can be defined as its capacity over a given period to:

- Attract and retain various economic activities and mobile factors of production (companies, professional events, people of talents, entrepreneurs, capital, ... etc., which are sometimes external to the region.
- Promote the creation of wealth and the growth of endogenous enterprises, centers of excellence and economic sectors.

Most of the work on this topic has so far touched on it in different ways, but no theoretical model has succeeded, to our knowledge, in establishing the empirical links between attractiveness and competitiveness.

METHODOLOGY AND RESULTS

The Attributes that Determine the Attractiveness of the Algerian Territory

In his Master's thesis in Geographical Sciences (Olivier Dominic Galarneau 2015) clarified the attractiveness of a territory as a relatively complex concept that relates to the motivations of individuals to travel, the specificities of his decision-making and the influence of socio-economic and cultural variables. Therefore, the attractiveness of a territory is not acquired since it must be constantly renewed to meet the new realities. The attractiveness of the territory is therefore the potential of a region to attract tourists according to the quantity and diversity of the natural and human attributes that compose it while adapting to the market demand.

A territory that wants to develop its lures in order to make its product more attractive must be able to diversify its offer of services and to rely on natural places, tourist infrastructures, a diversity of attractions including historic and cultural places, entertainments, in addition to providing transportation services and introducing welcoming people with a culture different from tourist's culture. The territory is therefore a product that can be modeled according to the segments of the targeted markets.

To measure the impact of the lures of the regions on the attractiveness of the territory, our work will cover the study the touristic position of Algeria, the accessibility of the territory and the various attractions present in certain touristic regions.

Table 1 presents a summary, by category, of all the attributes making up the attractiveness according to the research conducted by the authors consulted in the context of this Article. The compilation of the attributes shows that some of them are more important than others such as: the presence of natural places, the infrastructures of reception, tourist

attractions, the historic places, the accessibility and transport. None of the authors associate attractiveness to a single attribute. On average, each of the authors referred to eight attributes to determine the attractiveness of the territory. Based on this table, Algerian territory has all the advantages that will allow us to qualify it as attractive.

Table 1 Attributes of the attractiveness of the Algerian territory

Attributes		State in algeria
Natural heritage	Climate and landscape	the climate is typically Mediterranean with hot and dry summers but with mild and rainy winters.
		2.38 million km ² (10 countries the largest in the world) has many facets ranging from the coastline, the Atlas Mountains, the Highlands, the Sahara.
Logistics	Home infrastructure	1185 hotels with a capacity of 99605
	Accessibility and transport	the road network 104 000 Km the feral network 4 500 Km 35 airports 13 main ports
Tourist product	Cultural and historical place	07 World Heritage Sites 437 Historic Sites
	Event	05 international festivals
	Shopping centers	03 commercial centers with international standards
Economic social factors	security	Ranked 81/136 in Travel & Tourism Competitiveness Report 2017
	Price	Ranked 4/136 in TTCR 2017

Source: Author

Territorial attractiveness a concept or a measure?

According to our literature search, only one work referred to the calculation of the territorial attractiveness (Jean-Pierre Lozato-Giotart, Erick Leroux, Michel Balfet 2012)

The authors of this work have calculated the coefficient of territorial attractiveness CAT as the ratio between incoming and outgoing flows, the CAT can be used as a macro-indicator among the various methods of evaluation of tourist attractiveness of a territory.

According to Hatem's (2004) economic vision, five main categories of approaches include the concept of attractiveness, the image-based approach, the decision-making approach, the macro approach by global indicators, the "meso" approach through the differentiated offer and the "micro" approach.

Calculation of the coefficient of territorial attractiveness (CAT)

The calculation of the CAT according to Jean-Pierre Lozato-Giotart and Michel Balfet is often a convenient indicator to follow the evolution of the attractiveness of a touristic place, it is the calculation of the ratio between incoming and outgoing flows, the CAT can be used as a macro-indicator among the various methods of evaluating the attractive power of a territory.

According to the table, the CAT experienced a significant evolution compared to the other years where this coefficient did not exceed 0.5 it is due mainly to the improvement of the security conditions of the country.

Table N ° 02 Evolution of the coefficient of attractiveness of the Algerian territory

Year	2010	2011	2012	2013	2014
Incoming	1792306	2123157	2634056	4 119 371	4 173 584
Outgoing	1757471	1714654	1910558	2 839 104	2 135 523
Cat	1,019	1,238	1,378	1,45	1,95

Source: calculated by the author based on data from the Ministry of Tourism
 * attractiveness coefficient = incoming flows / outflows

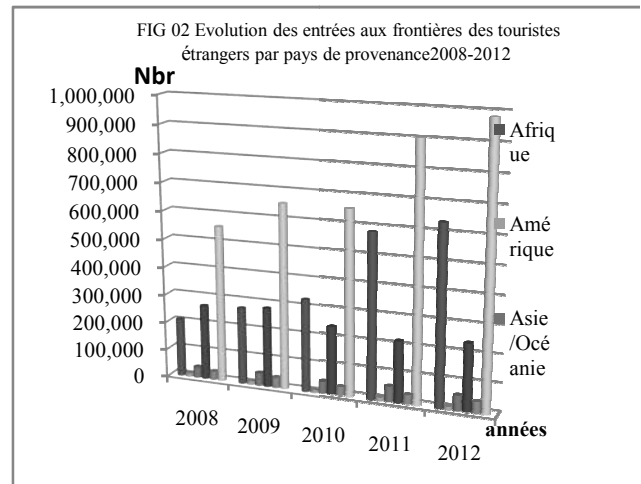
Measurement of Attractiveness by the World Tourism Organization (UNWTO)

UNWTO is the United Nations agency responsible for promoting tourism. This institution uses tourist flows, and especially the number of arrivals as a unit of measurement to determine the level of competitiveness of a destination. A drop in the tourist numbers for example is synonymous with a downward performance of activity, and consequently a decrease in the competitiveness of the destination in question.

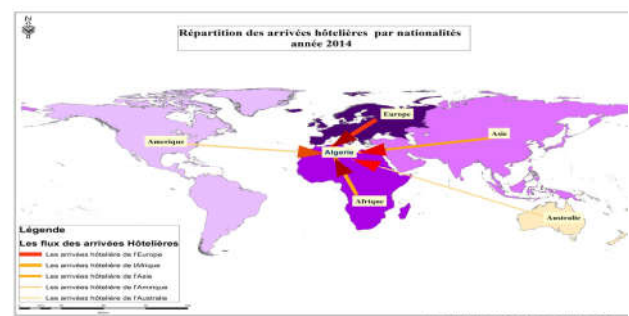
The attractiveness of the territory is a phenomenon that can be quantified since it can be measured according to the flows it generates (Viceriat *et al.*, 2007, Khadaroo and Seetana, 2008, Gagnon, 2007). This attractiveness is also qualifiable since it can also be related to the perception of tourists (Kim, 1998, Gallarza *et al.*, 2002, Wang and Hsu, 2010, Kim, 2010). According to an UNWTO report, entitled "UNWTO Tourism Highlights, 2014 edition". Algeria is the fourth most visited country in Africa with 2.7 million foreign tourists welcomed in 2013, behind Tunisia, South Africa and Morocco. This result is quite contradictory to the results obtained by the indicators of synthesis applied on Algeria which is often ranked at the bottom of the table. For even more accuracy, we have consulted the report (2009) of the London office of economic expertise Oxford Business Group (OBG), the observation was that of 1.74 million tourists who visited Algeria in 2008, more than 1, 2 million were Algerian expatriates returning to the country for the holidays. Just over 500,000 tourists are foreigners. In 2007 the figure communicated by the Algerian Ministry of Tourism represented 29% of foreigners vs 71% of Algerians living abroad and come for holidays in their country. Thus, the number of flows adopted by the OMT to measure the attractiveness of the territory is to revalue through the graph above. a calculation of the flows according to the country of origin shown that the number of tourists increased, that confirmed the increase of the CAT calculated at the top.

The map of flows by nationality shows that Africa is the leading emitter of international tourism followed by Europe, Asia the Middle East and America in last position. Therefore, the Algerian territory attracts the African population by excellence.

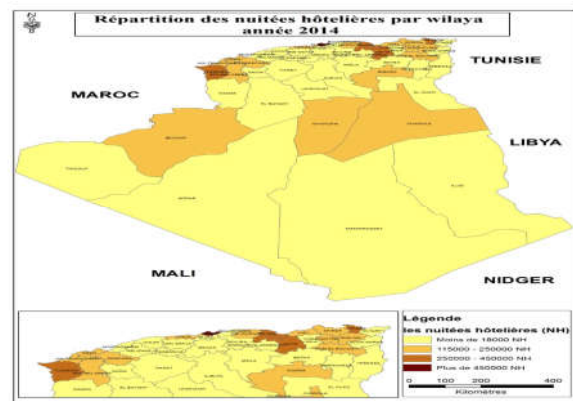
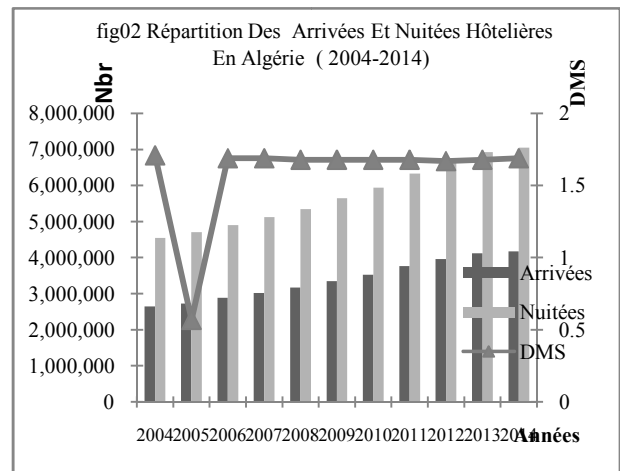
5-Is the number of Hotel nights an indicator of attractiveness? Tourism attractiveness can be measured by the number of hotel nights, this indicator reflects both the length of stay and the number of visitors. Map and graph of overnight stays in Algeria show a breakdown by wilaya of the total number of overnight stays in all types of tourist accommodation in 2014. Tourism activity in Algeria was often concentrated in the coastal regions (mainly along the Mediterranean), in the desert gate.



Graph N ° 01 Evolution of border entries of foreign tourists



Graph N ° 02 evolution of arrival and hotel nights 2004-2014



MAP N ° 02 Breakdown of hotel stays by wilaya

Between attractiveness of the Territory and Competitiveness of Destinations (Positioning of Algeria by the Indicators of synthesis)

What can be noted from the empirical work on attractiveness is that in many cases the concept of attractiveness is equated with that of competitiveness the Organization for Economic Cooperation and Development (OECD) from which we extracted the following definition:

"The competitiveness of tourism for a given destination corresponds to the capacity of the place to optimize its attractiveness for residents and non-residents, to offer the costumer quality, innovative and attractive tourist services (good value for money) and to gain market shares in the domestic and global market, while ensuring that the resources available to support tourism are used efficiently and sustainably."Based on this definition, key indicators have been developed to address the challenges of competitiveness analysis in the tourism sector. However, the synthetic index of competitiveness such as those built by the World Economic Forum are not enough to measure the attractiveness. The theory assuming that Algeria was not attractive, lacked homogeneity, was not founded based on a clear theoretical vision of the determinants of attractiveness, and generated contradictory and volatile rankings. The following table lists the most popular indicators, and gives a historical background of development of these indicators.

Table N ° 03 Measure of the Competitiveness of Algeria by the different indicators of synthesis

Publication	Year	World Ranking	Method
World Economic Forum (Business Competitiveness Index,)	2013	110/144	Composite index based on a few dozen indicators measuring conditions, competitiveness)
	2014	100/148	
	2015	79/144	
	2016	87/140	
World Invest ment Report (FDI Potential Index)	2016/2017	101/140	Composite index based on a dozen indicators of attractiveness of the country for foreign investment flows
WTTC (WORLD Travel & Tourism competitiveness Report 2017)	2017	118/136	The set of factors and policies that enable the sustainable development of tourism
ONU, (Index of human development	2016	83/188 Rank 3 in Africa and rank 6 in the Arab world	Composite index based on a few health, education and per capita income indicators

Source: different reports treated by the author

Algeria was in 21st position in the world ranking, which is indeed positive. Although considerable effort is still required to improve the competitiveness of the Algerian economy. The World Economic Forum's 2015 annual report, published jointly with the African Development Bank (AfDB), the World Bank and the OECD, which focuses this time on the competitiveness of African economies, reported a disparate situations concerning the competitiveness of the economy of the northern part of the continent. It is based on criteria such as GDP (Gross Domestic Product), the global value chain, the evolution of infrastructure and the education system ... that Algeria has been able to gain rank. The positive evolution of its ranking is therefore linked to these specific criteria. The economies of North Africa are noted according to the

evolution of three major sectors that determine the score of each country in the region. The first is the basic needs sector, which includes institutions, infrastructure, the macroeconomic environment, health and education. Secondly, performance concerns the quality of education, the efficiency and size of the market, and the finance and technology development. The third sector is innovation and sophistication. This is how countries earn points in some of these sectors and lose in others. Regarding tourism competitiveness it was first developed in 2001 by WTTC (WORLD Travel & Tourism competitiveness) a competitiveness index of tourism collaboration with the University of Nottingham. It is based on eight synthetic indicators that make it possible to assess the performance of each country relative to others. Price competitiveness is one of the major components. Built from an indicator based on hotel prices and purchasing power parity, the price competitiveness indicator ranges from 0 (the least competitive country) to 100 (the most competitive country). At the global level, there is a correlation between income level and price competitiveness: countries with high income levels are the least competitive. But this correlation weakens a lot when we consider the only emerging countries: the lowest income countries are not the most competitive and the most competitive countries go from Ethiopia to South Africa through Brazil. Algeria is in this category among the most competitive destinations, tied with Thailand. Among the Mediterranean countries, it appears as the most competitive country with a score of 91 ahead of Turkey, Egypt, Jordan and Morocco.

However, performance under this criterion does not systematically imply higher incomes for the country concerned. The price competitiveness of a destination depends on endogenous factors (costs, productivity) and on a set of indicators the notional actors miss. It depends in particular on air fares, which are related to the degree of liberalization of the sector and mainly related to travel agencies who play a significant role in the profitability of the sector, because of their influence on lowering the prices on bulk reservations. In a context of hotel overcapacity, their commercial power often allows them to impose on their own price conditions that barely cover their fixed costs. In the WTTC approach, tourism competitiveness is based on other, more qualitative elements:

- the index of opening aggregates several indicators (visa constraints, opening to the exchanges, level of the taxes on the exchanges);
- the "human tourism" index is the average of the tourism participation index (ratio of the number of tourists to the population) and an indicator measuring its economic impact;
- the infrastructure index is based on data on roads, sanitation and access to water; Environmental Index aggregates data on population density, CO2 emissions and implementation of international environmental agreements
- the technology index is mainly based on telecommunication diffusion rates;
- the Human Resources Index is based on the UNDP Education Index;
- social development index aggregates "social" indicators and media and Internet dissemination indicators

In this context, the World Economic Forum (WEF) published its second report "The Travel & Tourism Competitiveness Index 2008" positioning, based on indicator the competitiveness of 130 countries in terms of travel and tourism. This report assessed, based on comparative analysis, the determinants of the competitiveness of the travel and tourism sector by identifying the ways to improve its competitiveness. It also identified the main obstacles to tourism competitiveness in each country. According to this report, Algeria was ranked 102nd behind most countries considered in index.

PRESENTATION OF THE METHODOLOGY

The WEF has established an index to assess the competitiveness of each country in the travel and tourism "The Travel & Tourism Competitiveness Index (TTCI)". It measures, in a synthetic way, the factors and determinants of the competitiveness of the sector in 130 countries, as well as the effectiveness of policies to maintain and increase the attractiveness of this sector at the international level. The reputation and the improvement of the tourist competitiveness of a country evolved, indeed, according to multiple political, regulatory, human and environmental actions. These actions considered as part of the overall index consisted of 14 pillars structured in three broad categories:

The Regulatory Framework for Travel and Tourism

includes factors essential to the stage of development of travel and tourism, such as the regulatory environment, the level of safety and the degree of priority accorded by the government to this sector and levels achieved in terms of health and hygiene;

The Business Environment in the Sector

The quality of air and land transport infrastructure, as well as information and communication technology infrastructure and price competitiveness in the industry;

The quality of human, cultural and natural resources

Each pillar is composed of several variables (71 in total) and described a stage of development of the tourism sector of the country. The TTCI was elaborated in collaboration with a certain number of associated organizations and partners as well as heads of companies in the field of travel and tourism. It is based both on quantitative data from public sources, international institutions, travel and tourism experts, and on the results of surveys and opinion polls conducted by business leaders and investors in the field of travel and tourism.

METHODOLOGICAL DEFICIENCIES

Some limitations that impacted the relevance of the TTCI index. We noted

- The subjective nature of the questionnaires: 40% of the variables used come from surveys
- public opinion (qualitative variables). At this level, the risk of having wrong answers reflecting perceptions is not negligible;
- The incomplete information of the respondents, which risks generating a systematic bias of
- responses and therefore bias aggregation of the overall index;

- The cultural bias of international opinion surveys because of the cultural differences to the interviewed persons (they may show patriotism in favor or against a given country, possibly under the influence of objectives of the body conducting the survey);
- Problems of international comparability of responses: the formulation of questions orients the answer to a judgment of the realities of the country relative to the countries or leading practices in a wide variety of fields. There can be no assurance that the standards to which think the various people interviewed are the same, especially between different countries.

Report of the World Tourism and Travel Council 2017

The ranking of Algeria at 118 ranks is interesting in the comparisons it allows to make with the various countries selected, numbering 136 in 2017, and especially in the indicators and sub-indicators that it covers and the comparison scores achieved at these levels with those of other countries in the same perimeters.

The report, which analyzes the performance of 136 economies through the Travel and Tourism Competitiveness Index (TTCI), provides a unique overview of each country's strengths and development areas to improve industry competitiveness. It allows for cross-country comparisons, for assessing progress in country policy and for making investment decisions related to business and industry development. The report not only provides a platform for multi-stakeholder dialogue at the country level to formulate appropriate policies and actions. It also takes a holistic approach through industry trend analysis and offers the unique perspectives of global industry leaders, international organizations and government on critical issues to address to ensure the long-term competitiveness of the industry. travel and tourism.

First compiled in 2007, the Travel and Tourism Competitiveness Index (TTCI) measures "all factors and policies that enable the sustainable development of the Travel & Tourism sector, which, in turn, contributes to development and competitiveness of a country". The index was developed as part of the World Economic Forum's Industrial Program for Aviation, Travel and Tourism and in close collaboration with data partners Bloom Consulting, Deloitte-STR Global, the International Air Transport Association (IATA), the International Union for the Conservation of Nature the T & T competitiveness index measures four main factors of competitiveness. These factors are organized in sub-indexes, which are further divided into 14 pillars:

The activation environment sub-index, which captures the general settings needed to work in a country

- Business environment
- Safety and security
- Health and hygiene
- Human Resources and the Labor Market
- ICT preparation

T & T's Activation Policies and Conditions sub-domain, which captures specific policies or strategic aspects that have a more direct impact on the T & T industry

- Focus on travel and tourism

- International opening
- Competitiveness of prices
- Environmental sustainability

Sub-index of Infrastructure, which captures the availability and quality of the physical infrastructure of each economy

- Air transport infrastructure
- Terrestrial and port infrastructure
- Tourism service infrastructure

The sub-domain of natural and cultural resources, which captures the main "reasons to travel"

- Natural resources
- Cultural Resources and Business Travel

This flagship report is one of the most effective and instructive in the world, considering the quality of the teams that have been responsible for its elaboration, the tools and indicators it uses to measure the performance of countries in the fields of the research it retains, its methodology, as well as its usefulness for the managers and decision-makers in charge of the national and sectoral policies it concerns.

CONCLUSION

The attractiveness of the territory does not therefore constitute an "absolute" concept, capable of being the subject of a single measure, nor of a concept fixed in time. It can only be defined in a relative way, as the capacity of the territory considered to respond more effectively than its competitors to the demand of tourists. The different approaches to attractiveness have been presented in this article each has led to specific implications of politics of the territorial development. Through this work we tried to classify the factors that influence the competitiveness, and we found that these factors can change quickly, which makes the classification work even more complex. We found through the different covered literatures, that the Algerian territory meets to all the criteria of tourist attractiveness but it is still occupying the last ranking in terms of competitiveness.

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