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Determinants for tourist destinations' international markets access: The case of Southern Ecuador and Germany

Abstract

Many destinations aim at accessing international markets to generate income from abroad, stimulate innovation and develop new skills. This paper examines the determinants – conditions that may represent barriers or enhancers – for tourist destination's international markets access. We contrast various sets of determinants from: 1) tourism literature on internationalisation, 2) two extensive studies from the exports sector covering 48 years of data, and 3) empirical work on 30 cases at the destination and the source market, considering Cajas Massif's – Southern Ecuador – access to German organised groups. We found that tourism literature focuses on more specific conditions, such as distance or macroeconomic indicators; while exports' literature deals with a more complete range of conditions to explain determinants. We conclude that determinants such as collective initiatives, defined target markets or efficient processes play a priority role in tourist destinations; and that although exports' literature is useful, it is not totally transferable to tourism. Therefore, adding input from the empirical cases, we triangulate the data to consolidate a comprehensive overview of 46 determinants specific for tourist destinations' international market access. This work has implications for decision makers, firms, governments and educators.

Key words: categories; determinants; international market access; tourist destination; tourism internationalisation; Southern Ecuador; Germany

Introduction

Destinations' internationalisation is important because contact with foreign markets offers: new paths for development of information and knowledge; foreign income for the destination's economy; a competitive environment for innovation, technology and best practices; cooperation with more skilled organisations or individuals; the improvement of the destination's reputation; the reduction of dependency on domestic source markets; and the opportunity to attract long haul visitors who spend more than short haul visitors (Agndal & Elbe, 2007; Leonidou, 2004; McKercher, 2008; OECD, 2008; Pillmayer & Scherle, 2014; Romão, Neuts, Nijkamp & van Leeuwen, 2015).

Understanding and effectively addressing the determinants of access to international markets is important because: firms get advice to improve their performance; policy makers can identify where the destination requires support; universities and trainers can adjust their programs to the destination's needs; and, researchers can deepen knowledge of specific value for the destination (Leonidou, 2004; Önder, Candemir & Kumral, 2009; Squalli, Wilson & Hugo, 2010).

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To improve a tourist destination's access to international markets is a challenging task, especially if it is intended to support local development goals. Market access depends on multiple determinants, subject to local and international factors that are context dependant. Therefore, the identification of a comprehensive set of determinants influencing access to the target market would help to better address this challenge.

This paper is based on two key notions. First, the destination is considered as a collective entity (Hartman, 2016; Pavlovich, 2003; Viken, 2014), defined more by the participant actors than by geographical fixed boundaries. In other words, in this paper a tourist destination is considered as a group of actors trying to act together, with different degrees of internal coordination and mostly composed by Small and Medium Enterprises (SMEs) (Pearce, 2008; Song, Liu & Chen, 2013; Thomas, Shaw & Page, 2011; Vanneste & Ryckaert, 2011, 2012). Second, we use the term 'determinants', as in tourism literature (Culiuc, 2014; Eilat & Einav, 2004; Tavares & Leitão, 2017), to express a certain condition that, depending on the case, could act as either a barrier or an enhancer to access international markets. This approach allows to identify whether a destination can perform a certain action or has a certain capacity – *i.e. enhancer* –, or whether a destination cannot perform that action or does not have that capacity – *i.e. barrier* – for international market access.

In international market access studies, exports' literature refers mostly to 'barriers', and some authors include tourism as an export industry (OECD, 2008). However, although there are similarities between the fields of exports and tourism, there are also fundamental differences. Regarding similarities, exports and tourism aim at foreign markets and at generating foreign income for the national economy. Also, both need to design an offer and require abroad distribution channels (Pearce, 2008, 2009). Regarding differences: while exporters deliver finished products to be consumed in a foreign market, tourism is a co-created experience requiring the visitor's involvement at the destination (Agndal & Elbe, 2007; Nicolau, 2013; Smith, 1994; Williams & Shaw, 2011). Thus, while exporters focus on outwards logistics, destinations focus on inwards logistics (Williams & Shaw, 2011). And, while exporters promote products and services, whose quality depend mostly on the producer individual, and usually centrally-controlled performance, destinations promote experiences, whose quality depend on collectives of actors, often spread throughout vast territories.

Therefore, although exports' literature offers strong theoretical basis regarding international market access, specific determinants for tourism must be identified (Pillmayer & Scherle, 2014) and specified (Eilat & Einav, 2004). There are no studies that summarise a consolidated list of determinants of tourism destinations' access to international markets, or that explore them simultaneously from the perspective of the actors in the destination and source markets. Additionally, there is the call in tourism literature to enrich the study of barriers for internationalisation by adding findings from the perspective of developing countries and regional specific contexts (Leonidou, 2004; Pillmayer & Scherle, 2014). This paper attempts to contribute to filling those gaps.

We start with a literature review on tourism internationalisation and on exports. Then we explain the methodology, with five different sources, through four stages. Afterwards, we present the results in relation to each stage. Following, we discuss the resulting consolidated list of determinants in order of priority in the context of Southern Ecuador (the destination) and German organised groups (the source market). Lastly, we add some final remarks on the general findings, give suggestions based on the study cases, and comment on the potential and the limitations of the work.

Literature on international markets access

Tourism authors name determinants in a neutral way, referring to them not just in the form of constraints, but also as conditions that, if present, act as enhancers for market access. However, tourism literature tackles the topic in a fragmented way. Several publications take a macroeconomic point of view, using, for instance, gross domestic product (GDP), income level or exchange rates to explain determinants (Culiuc, 2014; Dogru, Sirakaya-Turk & Crouch, 2017; Eilat & Einav, 2004; Martins, Gan & Ferreira-Lopes, 2017; Tavares & Leitão, 2017). Among them, Önder et al. (2009) argue that governments are key influencers to encourage alternatives for international appeal, a logical conclusion when considering determinants from a macroeconomic perspective. In contrast, Williams and Shaw (2011) focus on more internal capabilities and highlight the importance of firms' innovation and the need for acquiring superior knowledge during the internationalisation process, as the key determinants for market access. Other authors stress the importance of factors like distance (McKercher, 1998; McKercher, 2008; Tavares & Leitão, 2017), or UNESCO's World Heritage Site declarations (Cellini, 2011; Huang, Tsaur & Yang, 2012; Su & Lin, 2014) as important determinants for market access. In these cases, authors deal with the difficulties of tourists to visit a destination because of the distance, suggesting that international reputation can justify the effort required to visit more distant destinations, or that distance can play sometimes a positive appealing effect if the destination is perceived as an exotic and pristine place. In their turn, Woodside and Dubelaar (2002) approach determinants for market access from a consumers' behaviour perspective, proposing a 'Tourism Consumption System' useful to increase effectiveness of marketing. In relation to determinants, their research focuses on the promotional aspects of reaching international markets, related mostly to an external phase when the destination tries to appeal visitors. While in the other hand, Pillmayer and Scherle (2014), approach determinants from a production perspective, a more internal phase, focusing on the challenges that SMEs deal with in regions of ongoing conflicts. Here, the key determinants are represented as the apparently negative social conditions for international tourism that local actors have to deal with. Agndal and Elbe (2007) explore the internationalisation process of SMEs in tourism, pointing at different determinants along that process, such as proactivity, physical and cultural distance, intermediation or collaboration, offering a more diverse perspective on the set of determinants that influence market access in tourism.

On the other hand, literature from the exports' sector refers to 'barriers' for market access, implicitly stressing the negative form of a determinant. These are the cases in the summarising work of Leonidou and in the extensive study of the OECD, who coincide in defining barriers for market access as '…all those constraints that hinder a firm's ability to initiate, to develop, or to sustain business operations in overseas markets' (Leonidou, 2004, p. 281; OECD, 2008, p. 194). These publications present detailed lists of *barriers*, grouped in different categories, using this *constraint* or *lack of* approach. However, one main difference between those studies is that: while Leonidou offers a comprehensive and insightful analysis of all barriers hindering small business export development, based on an integrative review of 32 empirical studies conducted during the period 1960–2000, as the source to identify 39 barriers; OECD presents its results based on an extensive survey to 978 SMEs in 44 countries, as the source to identify 47 barriers. The latter case included the tourism sector, but without differentiating its specific results from the other 10 exports sectors identified in the survey. Another important difference is that while the former study (Leonidou) basically classifies barriers as internal (informational, functional and marketing) and external (procedural, governmental, task and environmental), and by impact ranking; the later study (OECD) presents more forms of classifying its 47 exports' barriers: internal or external, clusters, type, importance for government or importance for firms, allowing to reflect on the diverse

barriers from different perspectives and their interrelations. In any case, the OECD's study – as a more recent work – takes in consideration and draws upon Leonidou's initial work, confirming and extending his results. More recently, Squalli et al. (2010) refer to international market access pointing out that it is determined by broader conditions than only the regulatory environment, usually invoked as the barrier to trade. Instead, the authors focus on three sets of determinant characteristics: the regulatory environment, public institutions, and network industries. Their study uses the World Economic Forum's annual survey as a unique and valuable source of a world-wide sample of the global business community's opinion, and they produce a measure of market access for a sample of 113 countries. The authors find that the regulatory environment – trade policy and formal barriers – is the least significant set of determinants, meaning that liberal policies do not guarantee enhancement of market accessibility, challenging, to some extent, the use of trade policy instruments as the key. Instead, they conclude that greater market access will be achieved via better network industries and public institutions, rather than via a more liberal trade policy regime. In other words, their research suggests that the defining factors for market access reside more in the so-called internal barriers than on external ones. These studies together cover 50 years of combined and in-depth data generated from literature and surveys performed around the world, showing that the exports sector counts with a solid knowledge base that identifies detailed and comprehensive sets of barriers for internationalisation.

In contrast, we argue that tourism literature still lacks a more comprehensive and structured set of determinants that incorporates, connects and extends the available literature on the topic, in order to better understand how to enhance a tourist destinations' international market access.

Methodology

To obtain a consolidated set of determinants for international market access in tourism, we progressively contrasted determinants from different sources, along four stages: 1) tourism literature, 2) exports literature, 3) empirical work and 4) consolidation.

In stage 1, we explored tourism literature. The criteria to select the works useful for our study was whether they directly referred to internationalisation in tourism and its related barriers or enhancers. 19 works, spanning between 1998 and 2017, were deemed relevant. These publications were contrasted checking frequencies of findings to track tendencies (Agndal & Elbe, 2007). As a result of this stage, we generated a first set of determinants, in this case, specific for tourism. *In stage 2,* we analysed and contrasted the lists of SMEs' exports barriers created by the extensive works of Leonidou (2004) and OECD (2008), discussed in the Literature review. The case of the exports' sector was deemed as a valid contrasting reference to explore determinants, because of its similarities with the field of tourism, as discussed in the introduction. Further, we deemed those works as unique and valuable sources because, combined, they represent 48 years of data, from 44 countries, and they are prior, broader and more interrelated than literature in the tourism field. As a result of this stage, we generated a new integrated set of determinants from the exports sector. *In stage 3,* we conducted empirical research. In order to obtain different perspectives to contrast with theory (Stages 1 and 2) regarding markets access barriers and enhancers, we considered cases from both ends (the destination -Ecuador- and the target market -Germany-). The selected cases were tour operators or tourism governmental institutions, because they play special coordination roles in market access (Ioannides, 1998; van der Zee & Vanneste, 2015). The work in this stage consisted of desk research to identify the cases, field observations and/or open-ended interviews to explore what are the conditions that the selected actors considered as key determinants for a destination to access international markets. Although typically four to ten cases are sufficient

(Eisenhardt, 1989) to differentiate between individual idiosyncrasy and general tendencies (Agndal & Elbe, 2007), we looked into 30 cases: 16 at the destination (Ecuador) visited between December 2015 and March 2016; and 14 cases (5 Ecuadorian actors plus 9 German actors) visited at the source market (Germany), in March 2017, during the ITB Berlin Travel Trade Show, the largest international travel fair in Germany. The actors interviewed during the ITB were Ecuadorian tour operators already selling to German partners, and German travel agents who were already promoting tours to Ecuador. In this way, we obtained practical information from actors who have dealt with (or continue to deal with) barriers to market access, but who have also discovered enhancers to overcome these barriers. As a result of this stage, we generated three additional sets of determinants, from the perspectives of: actors at the destination, Ecuadorian actors at the market, and German actors at the market. *In stage 4,* we contrasted the 5 sets of determinants built during the previous stages to consolidate a final set of determinants for tourist destinations. Again, we systematically checked for frequencies of findings, tendencies (Agndal & Elbe, 2007) and coherence. While some sources identified determinants in a negative form, as a barrier, stating for example 'unstained processes', other sources referred to the same determinant in a positive form, as an enhancer, stating for example 'sustained processes'. Thus, similar notions from the different literature review-based and empirically-based sets of determinants were progressively grouped under the same label, and they were finally expressed as a neutral determinant such as 'implement and sustain efficient processes'. This resulted in a final consolidated set of 46 determinants for tourist destinations' international market access. The ranking of the determinants' priority was stablished based on frequency of mention of each determinant throughout the different sets.

The context of the empirical cases

As mentioned in stage 3 of the Methodology, 30 cases served as the empirical basis for this paper. They all play a role between the Cajas Massif Biosphere Area (CMBA) (Southern Ecuador) as the destination, and German organised groups as the source market.

CMBA is a large region of 9,742 km^2, 833,372 inhabitants, including the territories of 15 municipalities, with Cuenca as its main city and touristic core (Rodríguez Girón et al., 2015). Here, four UNESCO's declarations coincide: Cuenca's city centre as Cultural Heritage Site in 1999; the Traditional Weaving of the Ecuadorian Toquilla Straw Hat as intangible Heritage in 2012; the Cajas Massif itself as a Biosphere Reserve in 2013; and, a section of the first multi-national declaration, the Andean Road System – Qhapaq Ñan – in 2014. The CMBA has no international airport or borders, being sort of a continental island and depending on other regions for international connectivity, which makes access to markets specially challenging.

On the other side, Germany has the world's highest density of travel agencies (DER Touristik, 2015), and is traditionally leading world's ranks of outbound travellers and per capita expenditure (UNWTO, 2016). This makes Germany especially important as source market of organised groups. Further, during 2015 Germany was the third top source foreign market arriving to Ecuador (MTE, 2017), and among the main nationalities arriving to Cuenca in the CMBA (GIER, 2016; Proaño, 2014).

This context, therefore, presents interesting characteristics to explore determinants from the perspective of: local actors at the destination, local actors at the market, and German actors at the market.

Results

As illustrated in Table 4, we consolidated a list of 46 determinants for tourist destination's international market access. As a result of the analytical process discussed in the methodology section, the determinants are classified in 10 categories: Collective, Intelligence, Management, Promotion, Government, Communication, Environment, Economic, Commercialisation, and Standards. These are the categories we use to present the results in the following paragraphs.

Stage 1 resulted in a list of 39 determinants from tourism literature. Originally, 20 were expressed in the form of barriers and 19 in the form of enhancers. When grouped, the categories of Intelligence and Management have the largest number of determinants, while Promotion and Government where the least populated categories (Table 1). When looked from the perspective of priority, the top barrier refers to physical distance (within management category), while the top enhancer refers to clearly profile the target market (within intelligence category). In general terms, tourism literature mostly focuses, in a fragmented way, on conditions such as distance, reputation, new technologies and macroeconomic indicators to explain determinants for international market access.

Table 1
Number of determinants per category resulting from stage 1: tourism literature

Determinants' categories	Number of determinants
Intelligence	9
Management	7
Economic	4
Commercialisation	4
Standards	4
Collective	3
Communication	3
Environment	3
Promotion	1
Government	1

Source: Authors' elaboration based on sources described in the methodology.

Stage 2 resulted in a list of 58 determinants, drawing upon the sources from the exports sector discussed in the literature review section. The Standards and Economic categories contain the largest number of determinants (Table 2). This suggests that, since the export sector offers more tangible products, this sector requires more attention to physical aspects of products such as finishing, packaging and delivery. Moreover, in contrast to tourism literature, the Intelligence category of the export sector appears with one of the lowest numbers of determinants. This suggests that as the tourism sector offers an intangible experience rather than a physical product, this sector requires attention to more diverse aspects of information and analytical skills to attract visitors from abroad. In the other hand, the categories of Promotion and Government coincide in both fields (exports and tourism), as the least populated ones. This confirms that there is a larger set of determinants to deal with for internationalisation, other than marketing and governmental interventions. These factors were typically cited by the private sector in the early stages of research, but after further analysis, they represented a minor part of a broader set of determinants to consider. Nevertheless, when looking into the priority assigned by exports literature to each determinant individually, that is, at a greater detail within each category, the top determinants are: information to analyse markets, and identification of business opportunities. Those determinants

are precisely in the Intelligence category, confirming their importance for both tourism and exports, although the total number of determinants per category vary in each field. These results helped to identify relevant notions for our research not considered in tourism literature (Table 1), as well as to identify irrelevant determinants for the case of tourism, such as: meeting export packaging requirements or accessing warehousing abroad. As a result, we obtained a stronger theoretical basis to contrast with the empirical sources.

Table 2
Number of determinants per category resulting from stage 2: exports literature

Determinants' categories	Number of determinants
Intelligence	3
Management	8
Economic	9
Commercialisation	6
Standards	12
Collective	6
Communication	6
Environment	4
Promotion	1
Government	3

Source: Authors' elaboration based on sources described in the methodology.

Stage 3, the empirical work, produced three sets of determinants, from the perspectives of: a) Tourism actors at the destination, with 37 determinants, b) Ecuadorian actors with presence in the source market, with 21 determinants, and c) German actors in the source market, with 24 determinants (Table 3). It is interesting to notice that for groups a) and b) the highest number of determinants relate to the Management category, while group c) did not identify many in that category. This is because, although actors from group b) have already a commercial presence in the source market, they still consider that Ecuadorian actors need to improve in aspects like sustaining processes or specialised skills. In the other hand, it is also interesting to notice that while group a) mentions several determinants related to the Collective category, groups b) and c) only mention two determinants in that category. This may be explained by the fact that b) and c) already have more or less stablished networks and access to the German market. In contrast, b) and c) mention more determinants related to the category of Promotion, precisely because as they have already built connections and partnerships, they have better identified distribution channels and final customers to promote to. Nevertheless, the top priority determinant mentioned by all groups were: group a) agreements, alliances and facilitation; group b) collective initiatives (both in the Collective category); and group c) trustable long-term local partners at the destination (in the Commercialisation category). Although these top determinants conceptually belong to different categories, the three of them relate to the capacity to work with other actors. This suggests that for all the empirical cases, independently of their level of market access or location, collective capacities are key factors for internationalisation.

Table 3
Number of determinants per category resulting from stage 3: empirical cases

Determinants' categories	Number of determinants identified by:		
	a) Actors at the destination	b) Ecuadorian actors at the source market	c) German actors at the source market
Intelligence	2	2	0
Management	11	6	2
Economic	2	2	1
Commercialisation	5	0	2
Standards	0	0	1
Collective	7	2	2
Communication	2	2	4
Environment	1	0	5
Promotion	3	5	5
Government	4	2	2

Source: Authors' elaboration based on sources described in the methodology.

Stage 4 produced a final consolidated set of 46 determinants (Table 4) for the access of tourist destinations to international markets. This was the result of systematically contrasting the previous sets of determinants and grouping them under similar concepts. In turn, within each category of the list, determinants are ordered by priority in relation to the full list. As mentioned, priority was assigned according to the number of sources referring to each determinant throughout the four analytical stages. It is interesting to notice that there were more coincidences on determinants between exports literature and the empirical tourism cases (21 coincidences), than between empirical tourism cases and tourism literature (only 17 coincidences). This confirms that, despite the fundamental differences between the fields of tourism and exports, exports literature is a valuable source for enriching various aspects in the study of determinants of access to international tourism markets. In the other hand, the differences between tourism and exports are represented in the 17 determinants from the exports literature that did not have any match with tourism literature or the empirical cases, or any relevance for the field, such as 'Supply inventory abroad', and therefore, were excluded from the final list in Table 4. Finally, in the final list there are also 8 new determinants identified from the empirical tourism cases, such as 'Implement and sustain efficient processes'.

Table 4.
Determinants for tourist destinations' international market access
(if a destination CAN / HAS determinant 'X' = Enhancer,
if a destination CAN NOT / HAS NOT determinant 'X' = Barrier)

COLLECTIVE DETERMINANTS	**Priority**
Perform collective initiatives	1
Regular face to face encounters with foreign partners	15
Private - private initiatives	22
Public - private initiatives	26
INTELLIGENCE DETERMINANTS	**Priority**
Defined target markets	2
Identify the appropriate income segment for the destination	24
Reliable international market data	31
Information to locate/analyse markets	38
Identify foreign business opportunities	44

Table 4. **Continued**

MANAGEMENT DETERMINANTS	**Priority**
Implement and sustain efficient processes	3
Innovate for and adapt to target market	4
Enough quantity and qualified personnel for internationalisation	5
An offer that justifies the travel distance	6
Appropriate organisation/institutional structures	7
Internationalisation experience	35
Dedicate managerial time to deal with internationalisation	37
Cope with international competition	43
PROMOTION DETERMINANTS	**Priority**
Customers' awareness of the destination	8
International reputation	10
Official promotion of the destination	20
Individual promotional activities adjusted to target markets	39
GOVERNMENT DETERMINANTS	**Priority**
Government's support programs for internationalisation	9
Political leadership	12
Authorities' control and regulation at destination	30
Transparent and efficient bureaucratic processes	41
Coherent policy to make official statements	45
COMMUNICATION DETERMINANTS	**Priority**
International flight connections	11
Use proper language	18
Communicate with and support overseas customers	29
ENVIRONMENT DETERMINANTS	**Priority**
Deal with conditions of safety and risk	13
Deal with political conditions	23
Deal with cultural differences	36
Deal with risk of natural disasters	42
ECONOMIC DETERMINANTS	**Priority**
Match competitors' price	14
Public budget for internationalisation	25
Deal with currency exchange rates	27
Private investment for internationalisation	28
COMERCIALISATION DETERMINANTS	**Priority**
Reliable foreign representation	16
Deal with internet (social networks-ecommerce) in efficient ways	17
Access international distribution channels	19
Control over foreign intermediaries	21
Efficient follow up and sales closing	32
Contact potential overseas customers	40
STANDARDS DETERMINANTS	**Priority**
Meet international quality/standards/specifications	33
Deal with foreign rules, regulations or procedures	34
Deal with home rules, regulations or procedures	46

Source: Authors' elaboration based on sources described in the methodology.

Discussion

The discussion will proceed by category, with respect to the relationships between the determinants of each category and the relationships with other categories, where relevant. The empirical cases from Ecuador and Germany will serve to illustrate and contextualise findings. The number indicated between parenthesis, e.g. (15), next to each cited determinant throughout the discussion, refers to the determinant's priority according to Table 4.

Collective category

This category includes the highest priority determinant, that is, whether destinations can *'perform collective initiatives'* (1). This refers to the capacity of identifying common interests among actors at the destination and cooperate with resources. This is closely related to the other determinants in this category: '*regular face to face encounters'* (15), *'private – private initiatives'* (22) and *'public – private initiatives'* (26), denoting the need for different forms of collective initiatives. The inability of Ecuadorian actors for collective initiatives, nevertheless, was identified as one of the biggest barriers. An institutional officer mentioned: '…we also experience in the country, and in the tourist sector very markedly, a low level of associativity, there is a lot of jealousy, business zeal…'. Accordingly, the need for agreements, alliances and facilitation was identified as the biggest enhancer. One of the Ecuadorian operators expressed: '…funding, leadership, that is logically important, but I think that first we must aim, really, is to facilitators or people that really achieve to generate confidence…'. This confirms that destinations, mostly formed by SMEs (Song et al., 2013; Thomas et al., 2011; Vanneste & Ryckaert, 2012), feel the need to enhance their collective capacities to thrive. McKercher (2008) found that even a world renowned destination like Hong Kong, represents only the 10% of the total trip duration of long haul visitors, largely depending on other associated destinations to remain attractive. The determinant 'perform collective initiatives' (1) was mostly highlighted by Ecuadorian cases, and although its importance was confirmed by literature, German cases did not expressly mention it. Arguably because interviewed German agencies already operate in South America, with Ecuador only as a portion of their operation, thus, they have already covered their needs for cooperation at an international scale. Nevertheless, 'reliable foreign representation' (16), within the Commercialisation category, was the top determinant for most German actors. This suggests that, to enhance their appeal to international organised groups, destination's actors must position themselves as trustable partners within the international context, through collective initiatives with other destinations in the country and at the supra-national level (e.g. Ecuador – Peru).

Intelligence category

Its top determinant is whether a destination has *'defined target markets'* (2). Although a basic first step, it is often overlooked because governments and firms tend to prioritise action over planning, taking random opportunities emerged by chance, becoming a reactive destination (Agndal & Elbe, 2007). The prior agreement of the target markets between the actors of the destination is key to local development, as the actors must reflect on the type of tourism desired and the visitors they wish to attract (McGehee, Lee, O'Bannon & Perdue, 2010; Zhao, Ritchie & Echtner, 2011). Therefore, determinants from the 'collective' category also play a role. Having 'defined target markets' is closely related to the other determinants in the 'intelligence' category. This is because the destination requires *'reliable international market data'* (31) and *'information to locate/analyse markets'* (38), in order to do two things: first, *'identify the appropriate income segment for the destination'* (24), and second, *'identify foreign business opportunities'* (44). These decisions might require more knowledge than expected at

first sight and may explain why destinations are only capable of showing a reactive behaviour. In the cases of the Ecuadorian actors, none of them could mention a defined target market for the CMBA. One of the biggest Ecuadorian tour operators interviewed mentioned: '…no, because we [the destination as a collective] are opening doors, right? saying "let them come"…' In this way, the destination's efforts are inconsistent, hindering its capacity to attract specific types of visitors in a proactive way. A proactive behaviour implies having the required leadership, personnel, and time to define: the desired type of tourism, the correspondent type of visitors, and where they are. As stated in tourism literature: '[u]nderstanding their [the visitors'] needs and behaviours will be a cornerstone of marketing success' (Cohen, Prayag & Moital, 2014, p. 890), because '[f]inding groups of consumers with strong, homogeneous bonds is the "Holy Grail" of marketing' (Schewe & Meredith, 2004, p. 51). Only then, results on attracting the best segment of visitors according to the destination's development goals can be reachable and demonstrable.

Management category

Its top determinant is whether a destination can *'implement and sustain efficient processes'* (3), in the sense of maintaining consistent efforts in the long-term. Its importance is illustrated in a simple statement by an Ecuadorian tour operator: '…continuity generates ability, right? ...'. This issue is widely mentioned by public and private Ecuadorian actors. However, it is not explicitly mentioned or highlighted in the reviewed tourism or exports' literature. Nevertheless, sustained processes are required to reach markets in a proactive way. Contrary to the case of goods, at the destination, nothing is pre-produced and the tourism experience (Andersson, 2007; Nicolau, 2013; Smith, 1994) might incorporate several firms and governments (Haugland et al., 2011; Scott et al., 2008) spread in wide regions, who might want to use tourism as a lever for poor and, often, unskilled local inhabitants. In the CMBA and its surroundings, the main natural areas and cultural sites are under the administration of different local or national authorities. This makes processes for coordination indispensable. However, a typical situation of a destination's lack of processes is highlighted by a planning facilitator in Ecuador: '…if I make a plan just for obligation, but at the end I keep doing all of what I have been traditionally doing, based on the institutional culture, without sticking to what the plan establishes, I am wasting money by doing the plan…'. Thus, to 'implement and sustain efficient processes' is key to the other determinants in the 'management' category, because it would allow the destination to have *'enough quantity and qualified personnel for internationalisation'* (5), within '*appropriate organisation/institutional structures'* (7), that *'dedicate managerial time to deal with internationalisation'* (37). In this way, the destination can accumulate *'internationalisation experience'* (35) to *'innovate for and adapt to the target market'* (4), allowing it to *'cope with international competition'* (44). Only then, the destination can develop *'an offer that justifies the travel distance'* (6). Lack of sustained processes at the destination is deeply regretted by actors. But this is difficult to overcome, because it first requires provision of resources to improve professionalisation giving preference to long-term initiatives that are well articulated with clear short and mid-term step stones along the way.

Promotion category

Its top determinant is whether there is *'customers´ awareness of the destination'* (8). This determinant was mostly cited by German and Ecuadorian cases at the source market, while it was not explicitly mentioned in the literature. Outbound tour operators at the source market argue that it is hard to sell a destination that is not in peoples' minds. This creates a paradox: German travel agencies offer what customers demand, but customers' demand is influenced by what German agencies offer them in the first place, making it hard for a new destination's offer to enter the portfolio. The dynamics of

an increment in offer only after an increment in demand, is confirmed by Culiuc (2014) who found that new direct flights are added only the year after bilateral tourism see a large increase. Thus, to influence the determinant of 'customers´ awareness', destinations can play the role of a third force between customers and agencies at the source market, trying to increase people's awareness via promotion and divulgation. This leads us to the other three determinants in the 'promotion' category. First determinant, to have *'international reputation'* (10), via, for instance, inscriptions in the World Heritage Sites (WHS) list by UNESCO as a customers' awareness leverage (Culiuc, 2014; Su & Lin, 2014). Second determinant, to have *'official promotion of the destination'* (20) as an umbrella initiative to generate awareness in the target markets, and for firms to leverage their specific offers under that umbrella. Nevertheless, a German tour operator mentioned: '…you [the customer] cannot know everything, that's the reason why we're here, but the lack of marketing budget from the [Ecuadorian] government, that is a big issue for the German tour operator'. In his opinion, the government is not putting enough effort as that third force to influence customers' awareness and demand for the destination, becoming hard for tour operators to sell it. And the third determinant, to have *'individual promotional activities adjusted to target markets'* (39) by the private sector, building upon the destination's official promotional efforts to harvest better results. For instance, via internet marketing messages for specific targets (Woodside & Dubelaar, 2002), or via live presentations, as an inbound Ecuadorian agent commented: '…we make trainings, I particularly trained 400 travel agents last year in different parts of America…'. Thus, if destinations want to increase customers' awareness, several determinants must be considered. The CMBA has potential to influence the 'international reputation' determinant, as four different UNESCO's declarations coincide within its territory and, as tested by Su and Lin (2014), the higher the number of WHS recognitions, the higher international attractiveness is consolidated. This should be stressed through governmental, private and collective promotional activities.

Government category

Its top determinant is whether a destination has *'government´s support programs for internationalisation'* (9). This determinant was mostly highlighted in literature and is highly related to the determinant *'political leadership'* (12), which emerged from the study cases. Tourism literature mentions that governments' institutional improvement, willingness for new types of alliances and support for innovation, are key to access international markets (Hjalager, 2007; Önder et al., 2009; Squalli et al., 2010). While from the empirical side, regarding political leadership, an Ecuadorian tour operator in Germany mentioned: '…if there is no political decision along with the resources, the people able to organise this kind of events, it would be impossible for the [Ecuadorian] tourist industry to participate [at ITB] …'. Other determinants in this category, which also emerged mostly from the empirical side, are whether the destination has *'authorities' control and regulation at destination'* (30), *'transparent and efficient bureaucratic processes'* (42) and a *'coherent policy to make official statements'* (30). This confirms that tourism actors expect the government to foster certain general conditions, that go beyond the business arena, but that will improve the overall destination's performance. At the CMBA, most local and provincial governments have a tourism department, and few, under diverse models, have constituted a Destination Management Organisation (DMO). Nevertheless, these initiatives are not yet well articulated, being still in an adaptation process to play a more influential role, which currently, as Pike and Page (2014) observe, are mostly related to marketing and limited in terms of power for real management decisions. Cuenca's DMO mentioned: '...we are working on the possibility to work under the figure of a public enterprise, which would be, which would give us more freedom of action. From that point, we can work more closely with the private sector…'. According to OECD (2008), government's support programs and leadership for internationalisation suppose the allocation of resources and decision to

improve: financial alternatives, business environment, agents' capabilities, and accessibility to markets. In other words, the challenges of transforming determinants from barriers into enhancers, create opportunities for government's support to strive for a stable general environment and look for cooperation with higher level and/or international governments to cope with the local lack of resources or skills.

Communication category

Its top determinant is whether a destination has *'international flight connections'* (11). This is pointed as key by literature (Culiuc, 2014; Squalli et al., 2010) and it is especially challenging for the CMBA case, as this territory has no international airports or borders. Thus, determinants from other categories are crucial, such as: 'perform collective initiatives' (1), to get included into existing tours to broader nearby regions; or 'innovate for and adapt to target market' (4), to develop 'an offer that justifies the travel distance' (6). The other determinants in the 'communication' category are whether the destination can *'use proper language'* (18) and can *'communicate with and support overseas customers'* (29). 'Language, as always, becomes an instrument of power' (Williams & Shaw, 2011, p. 44) and international market access requires 'language capital' (Dustmann, 1999, p. 297). Even if the source market shares the mother tongue, knowledge on non-verbal language, region-specific terminology or other communication practices, will enhance the destination. This will help not only in contacting but also in supporting overseas customers and foster stronger ties. Interestingly, for some tour agencies at the source markets the lack of German speaking guides at the destination was not a barrier for the operation, either because customers speak good English as those clients '…often try to learn Spanish before they go to South America', or because '…they [the visitors] even go to South America without Spanish and they manage it somehow'. However, for the phases before operation, when tourism actors are just getting in touch and building partnerships, it is fundamental to master at least English, while German would really make a difference in relation to our study cases. As stated by a German outbound agency, one of the most important aspects '…when I'm deciding on taking a destination in [the agency's offer], is having a good German speaking agency on site'. Nevertheless, destinations must bear in mind the different communication determinants discussed here, to enhance their access to international markets.

Environment category

Its top determinant is whether a destination can *'deal with conditions of safety and risk'* (13), which is in turn closely related to whether the destination can *'deal with political conditions'* (23), or *'deal with risk of natural disasters'* (46). Governments play a fundamental role in these determinants. However, fostering a positive environment is also in the hands of the private sector and local residents, which is related to the last determinant in this category, whether the destination can *'deal with cultural differences'* (36) referring to foreign markets' and visitors' behaviour. These determinants point to the overall preparation of the destination and the way in which the factors that greatly influence source market perceptions are handled. Literature and tour operators, especially from the German side, coincide here. Culiuc (2014) argues that visitors avoid countries where they are aware of ongoing conflicts. While a German operator exemplified how the German government also influences the perception of safety and risk, through its Foreign 'Auswärtiges Amt' (Foreign Affairs Ministry): '… they give information to [about] countries all over the world, [this] means security, means how to enter the country, what are the current…, like health information what do you need for aaah…, to travel to that country'. Paradoxically, other German operators mentioned that risk of natural disasters, does not represent necessarily a barrier as '…you cannot avoid it, when a volcano is working like in Costa Rica, Ecuador,

it happens, it can happen every day, when a tsunami is coming, it happens, it's…, it's out of our influence". Apparently, risk perception has more to do with feeling prepared to know how to react, than with the risk itself. This shows a relationship with the already mentioned determinants of having a 'coherent policy to make official statements' (45), to tame negative perceptions and avoid harming 'international reputation' (10).

Economic category

Its top determinant is whether a destination can *'match competitors' price'* (14). Actors at the destination and in Germany considered Ecuador has a disadvantage because a strong currency as the US dollar (Ecuador's currency) makes it more expensive (Culiuc, 2014; Martins et al., 2017) in relation to neighbours with weaker currencies (Eilat & Einav, 2004). This is related to the determinant whether the destination can *'deal with currency exchange rates'* (27) and avoid reduction of visitors and length of stay (Culiuc, 2014). An Ecuadorian DMO mentioned that '…many people consider that Quito´s [the capital] airport is one of the most expensive, at least in the region'. While from the German side, an agency that started new operations in 28 countries including South America, indicated that Ecuador was not included because '[y]eah, price is deciding!'. Nevertheless, in accordance with Culiuc (2014), operators mentioned that in some cases uniqueness compensates for higher prices: '…the Galapagos Islands, is pretty unique in South America, so we are doing well in Ecuador'. Unfortunately for the CMBA, the uniqueness of other regions in the country is not automatically transferable. An Ecuadorian operator explained '[i]f I want to sell Cuenca [in the CMBA], that means I have to send them [the visitors] on a flight to Cuenca and that is not the problem, the problem is the price, that gets higher'. This confirms the importance of proactivity to work on determinants, for example, from the 'management' category, such as developing an 'offer that justifies the travel distance' (6) or to 'innovate and adapt to target markets' (4). Returning to the 'economic' category, Ecuadorian actors typically complain about the lack of '*public budget for internationalisation'* (25) as a key determinant. Nevertheless, a detailed analysis with public and private destination's actors reveals that the issue is not so much related to low budgets, but to a lack of efficiency in using available resources or incapacity to create new funding streams. This, again, points to fundamental determinants from the 'management' category, such as 'enough quantity and qualified personnel for internationalisation' (5), or to have the 'appropriate organisation/institutional structures' (7). The final determinant in the 'economic' category, which reveals an aspect overlooked by the private sector, is whether the destination counts with *'private investment for internationalisation'* (28). Exports' literature that also considered the tourism sector in its analysis, found that '…SMEs without experience of exporting tend to overstate barriers associated with finance and access to markets whilst underestimating the need for highly developed internal capabilities…' (OECD, 2008, p. 53). This is confirmed by the empirical cases of our study, where we found that those tour operators who made sustained investments to develop overseas relationships, are the ones with alternatives to access international source markets of organised groups; while those tour operators that did not invest, are competing among themselves at the destination based on the lowest price to capture individual random visitors. Thus, while matching competitors' prices is a determinant, analysis suggests that for the destination's enhancement it is even more determinant to first develop its actors' internal capabilities (OECD, 2008). In summary, to enhance the offer, to foster trustable distribution channels, and to stimulate qualified services allow the destination not to depend only on price for competition (Tavares & Leitão, 2017).

Commercialisation category

Its top determinant is whether a destination has *'reliable foreign representation'* (16). The need for trustable long-term local partners was highlighted mostly by the German side and supported by literature. Having foreign representation is especially important for young initiatives (Agndal & Elbe, 2007) and is related to another determinant: whether a destination can *'contact potential overseas customers'* (40). Since a tour needs to be sold in another country, before consuming it and without the chance to test it beforehand (Nicolau, 2013), customers will more easily be contacted by and have trust on a local than on a foreign seller (Agndal & Elbe, 2007). Foreign representation is also one of the options to tackle the determinant of whether the destination can *'access international distribution channels'* (19). Nevertheless, some operators at the destination reported the risk of being kicked out the supply chain: at least in an initial stage, the foreign partner relies on the local firm's knowledge (Williams & Shaw, 2011), but after acquiring enough experience in the destination, seeking to reduce costs and increment control, the foreign partner opens its own local Destination Management Company. In this case the roles of local employees are typically limited to administration and operation, while the greater economic benefits leak abroad, where the decision-making and top managerial positions are located (Lansing & Vries, 2006). Thus, a determinant identified as another option for 'commercialisation' is whether a destination can *'deal with internet (social networks – ecommerce) in efficient ways'* (17). Over decades, internet has promised to ease direct international market access. Nevertheless, some argue that disintermediation has been overrated (Kaewkitipong, 2010; Rosenbloom, 2007) as there is a myriad of on-line services and intermediaries to choose from (Buhalis & Law, 2008; Kracht & Wang, 2010). Thus, to use internet as a direct access channel, a thorough understanding is required on how technology works and how it shapes behaviour (Cohen et al., 2014). As a result, firms use internet mostly to provide general information, but not in an strategic way to achieve direct sales (Agndal & Elbe, 2007). Either, via representation or via a more direct approach, the other two determinants in the 'commercialisation' category point to: the level of the destination's *'control over foreign intermediaries'* (21), such as partner travel agents at the source market or online distribution channels; and whether the destination can do an *'efficient follow up and sales close'* (32) after initial contacts were established with potential distribution channels. In this regard, the examined Ecuadorian cases that acheived market access confirm that it is more important aiming at nurturing ties of trust with foreign intermediaries, or at using personalised marketing, than aiming at generic publicity to the broader public. These are key considerations for destinations to tackle also the determinants in the 'promotion' category.

Standards category

Its top determinant is whether a destination can *'meet international / quality / standards / specifications'* (33). This is related to the other two determinants of this category, which are near the bottom in priority ranking: whether the destination can *'deal with foreign rules, regulations or procedures'* (34) and can *'deal with home rules, regulations and procedures'* (46). Their low priority ranking coincides with theory, which finds that among factors like public institutions, network industries, and the regulatory environment, the latter is the least influential for market access (Squalli et al., 2010). This must not be confused, however, with the idea that complying with standards and regulations is not determinant. Especially because, mainly in most wealthy countries, there is an increasing interest for offers that can certify support for social or environmental sustainable processes (Cohen et al., 2014; Valéry Bezençon & Sam Blili, 2010). Additionally, we must consider that quality has been implicitly tackled in other determinants. For example, international quality levels, standards or specifications must be observed for

a destination to: 'develop an offer that justifies the travel distance' (6), 'access international distribution channels' (19), or 'use proper language' (18). While home and foreign regulations must be observed to: 'perform collective initiatives' (1), have the 'appropriate organisation/institutional structures' (7), or have 'authorities' control and regulation at destination' (30). Therefore, we argue that when discussing determinants, actors did not explicitly stress quality and regulation aspects because 1) they have not found this determinants to be some of the biggest barriers, which coincides with findings from the exports' literature (Leonidou, 2004; OECD, 2008; Squalli et al., 2010), and 2) implicitly, tourism actors assume that standards and regulations are not optional conditions but conditions that they have to comply with anyway. In all circumstances, destinations must not overlook the enhancement on the capacities and knowledge required to tackle determinants of the 'standards' category.

Final remarks

In this article, we have analysed the determinants for a destination to access international markets. We have contrasted tourism literature, exports literature and empirical results on 30 cases related to the CMBA in Southern Ecuador, as the destination, and German organised groups, as the target market. As a result, we have built a prioritised set of 46 determinants, useful for destinations to assess their situation and to contribute to the tourism literature on international market access.

While destinations aiming for internationalisation are conformed by collectives of actors trying to attract foreign markets, determinants represent certain conditions that hinder or enable those collectives to achieve their goals. Therefore, in this article we have discussed determinants from the perspective of collectives trying to tackle them. These determinants, however, can also be applied to a considerable extent to individual agents.

One main remark is that, although we have ranked determinants based on frequency of citation in the different sources, there is no one central determinant to tackle, they are interdependent. We argue, therefore, that determinants should be observed as a set of different aspects, with varying levels of influence, depending on the context. Also, within a destination, the effect of determinants is not the same for all actors. It is important that the destination's facilitators identify the level of preparedness of each actor to make it participate accordingly. Additionally, determinants, are not static but dynamic circumstances. In other words, today's barriers could be tomorrow's enhancers, or vice versa. This depends on how destinations tackle the determinants that condition their international market access.

In relation to the analysed empirical cases, one key determinant is the fact that the CMBA does not have international air or land connectivity. For those actors, key determinants are the ones listed in the categories: 'intelligence', to accurately define target markets so they can concentrate scare resources on achievable goals; 'collective', to improve internal associativity and connect with other international touristic routes already stablished; 'management', to improve professionalisation and innovate for an offer attractive enough to justify travel distance, something that, in turn, requires the appropriate institutional structures; and 'government', to have the political leadership for the required institutional changes to cope with the highly dynamic and competitive market of international organised groups. One option is to think of a platform that offers support programs on market intelligence, sustained professionalisation, technology enhancement, and international commercialisation. Such initiative could start with public funding, should lead regional tourism development, and have enough administrative independence to generate its own income sources.

Finally, in the CMBA – German organised groups relationship, it is advisable to think of new approaches. The German market seeks for more experiential, live journeys, and to deepen into the local culture. Modalities like: Spanish study programs based on the 4 UNESCO recognitions coinciding in the region; live activities around worldwide positioned concepts such as the straw weaving hat, fine organic cacao and banana produced by family-based organisations; practical workshop lessons with ceramics and jewellery artisans; or gastronomic routes tasting food from the Pacific coast, passing by the Andean region and reaching the Amazon basin, can be some of the differentiation options. This new approach should strategically position Cuenca – the touristic core of the CMBA – as the main destination and logistic centre, from where groups depart for shorter journeys around the region. However, as discussed, the interrelated determinants for this case need to be strategically and collectively tackled.

Beyond the cases we have analysed in this paper, we expect to contribute to a more integral perspective of the different determinants that influence international market access. We think that the consolidated list is widely applicable beyond the examples in this paper. Further work should focus on testing the validity of the proposed list in a range of other cases and discuss how to refine it.

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