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School of Marketing

**A Study to Develop a Strategic Model
for the Ethiopian Tourism Industry**

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TABLE OF CONTENTS

	PAGE
List of Tables	vii
List of Figures	xii
List of Maps	xiii
Acknowledgements	xiv
Qualifications	xv
Abstract	xvi
 CHAPTERS	
1. INTRODUCTION AND PROBLEM DEFINITION	1
1.1 Introduction	1
1.2 Objectives of the Study	8
1.3 Importance of the Study	8
1.4 Motivations for the Study	10
1.5 Scope of the Study	10
1.6 Related Literature	11
1.7 Conceptual Definition	13
1.8 Common Elements in the Definition of Tourism	15
1.9 Definitions of a Tourist	16
1.10 Domestic Tourist Defined	18
1.11 Common Classification of Travellers	19
1.12 Tourist Typology	21
1.13 Basic Approaches to the Study of Tourism	22
1.14 Conceptual Framework for Tourism Development	23
1.15 Summary and Conclusion	23
1.16 Outline of the Study	23
 2. ENVIRONMENT FOR TOURISM	 25
2.1 Introduction	25
2.2 Historical Role of Tourism in an Economy	26
2.3 Tourism Development Policies in Kenya: a Case Study	33
2.3.1 Policy Orientation	38
2.3.2 Planning Responses	40
2.3.3 Kenya's Tourism Markets	41
2.3.4 Perception of Kenya as a Tourist Destination: Lessons to be Learned	42
2.4 The Role of Tourism in Ethiopia	47
2.4.1 Employment	48
2.4.2 Contributions to the Economy	49

2.5	Infrastructure	51
2.5.1	Infrastructure Development in Ethiopia	53
2.5.1.1	Surface Transport	54
2.5.1.2	Rail	58
2.5.1.3	Water Transport	59
2.5.1.4	Air Transport	59
2.5.2	Communications	67
2.5.2.1	Telecommunications Services	68
2.5.2.2	Postal Services	68
2.5.2.3	Communications Media	69
2.5.3	Utilities	71
2.5.3.1	Electricity	72
2.5.3.2	Water Supply	73
2.5.3.3	Sewage	74
2.5.4	Health Services	74
2.6	Conclusion	75
3.	TOURIST FACILITIES	77
3.1	Introduction	77
3.2	Accommodation	77
3.3	Tourist Attractions in Ethiopia	85
3.4	Travel Agency	91
3.5	Obstacles to the Development of Facilities in Ethiopia	95
3.6	Conclusion	96
4.	ETHIOPIAN TOURISM HISTORY	98
4.1	Introduction	98
4.2	The Ethiopian Hotels and Tourism Corporation	102
4.3	The Ethiopian Tourism Commission	103
4.4	Need for Tourism	106
4.5	Origins of Tourists to Ethiopia	110
4.6	Motivations for Visitations	114
4.7	Conclusion	116
5.	MARKETING OF TOURISM	118
5.1	Introduction	118
5.2	Tourism Marketing Defined	119
5.3	Orientation	120
5.4	Tourism Marketing Vs Manufactured Products Marketing	122

5.5	Marketing Strategies	122
5.6	Market Segmentation	130
5.7	Developing the Promotional Plans	131
5.7.1	Promoting Image	132
5.8	Roles of Governments	135
5.9	Country Cases	136
5.10	Tourism Marketing in Ethiopia	139
5.11	Competing Countries	142
5.12	Promotional Strategy	144
5.12.1	Short- and Mid-term Promotional Strategy	144
5.12.2	Long Term Strategy	145
5.13	Obstacles	145
5.14	Market Research	146
5.15	Conclusion	147
6.	SUB-SAHARAN AFRICAN COUNTRIES AND TOURISM DEVELOPMENT	149
6.1	Introduction	149
6.2	Survey of Sub-Saharan Africa	158
6.2.1	Findings	160
6.2.2	Discussion	171
6.3	Conclusion	174
7.	RESEARCH	175
7.1	Introduction	175
7.2	Research in Ethiopia	175
7.3	Research in Australia	177
7.4	Research in Sub-Saharan African Countries	178
7.5	Research Methodology	179
7.5.1	Personal Interviews	179
7.5.2	Questionnaire Surveys	182
7.6	Academics' and Students' Perception of Ethiopia as a tourist destination	184
7.6.1	Results and Discussion	192
7.7	Tour Operators' Perceptions of Ethiopia as a Tourist Destination	194
7.7.1	Methodology	195
7.7.2	Results and Discussion	205
7.8	Student and community perception of Ethiopia as a Tourist Destination	206

7.8.1	Methodology	207
7.8.2	Results and Discussion	216
7.9	Curtin Alumni members' perception of Ethiopia as a Tourist Destination	216
7.9.1	Methodology	216
7.9.2	Results and Discussion	217
7.10	The Perception of Ethiopia as a Tourist Destination: As Ethiopians in Australia see it	220
7.10.1	Methodology	220
7.10.2	Results and Discussion	220
7.11	Ethiopian Tourism Officials' view of the country's tourism development	230
7.11.1	Methodology	232
7.11.2	Results and Discussion	233
7.12	Implications of the Findings of the Surveys	240
7.13	Conclusion	244
8.	STRATEGIC ANALYSIS	249
8.1	Introduction	249
8.2	Strategy Development in Tourism	251
8.3	Environmental Scanning	256
8.4	Stake holder Analysis	259
8.4.1	Stake holder Assumptions	267
8.5	Vulnerability Analysis	271
8.6	Growth Vector Analysis	274
8.7	Product Portfolio	275
8.8	Strategic Position and Action Evaluation (SPACE)	276
8.9	Industry Analysis	279
8.10	Country Risk Assessment	281
8.11	SWOT Analysis	282
8.12	Key Success Factors	288
8.12.1	Key Success Factors and the Service Industry	291
8.12.2	Key Success Factors in Tourism Development	292
8.12.3	Key Success Factors and the Ethiopian Tourism Development	293
8.13	Ethiopian Tourism: Strengths, Weaknesses, Opportunities, and Threats	296
8.14	Key Result-Objectives for the Ethiopian Tourism Development	299
8.15	Industry Capability Profile	301
8.16	Implications	305
8.17	Conclusion	308

9.	STRATEGIC PROCESSES FOR TOURISM DEVELOPMENT IN ETHIOPIA: MODELS	309
9.1	Introduction	309
9.2	Existing Strategic Models and Modifications	310
9.3	Strategic Models for Ethiopian Tourism Development	317
9.4	Conclusion	331
10.	IMPLEMENTATION STRATEGY	333
11.	SUMMARY, IMPLICATIONS, LIMITATIONS AND CONCLUSIONS	343
11.1	Summary	343
11.2	Implications	346
11.3	Limitations	346
11.4	Conclusions	346
	REFERENCES	348
	APPENDIX	
Appendix A	Research Instruments	367
Appendix B	List of Officials Contacted	416
Appendix C	List of Officials Interviewed in Ethiopia	422
Appendix D	List of Organizations Contacted	424
Appendix E	List of International Organizations Contacted	428
Appendix F	List of Sub-Saharan African Countries included in the Survey	430
Appendix G	Excerpts of Personal Interviews in Ethiopia	432
Appendix H	General Comments received from Survey Participants	496
Appendix I	Proceedings of a Paper presented to the 1992 Western Australian Intersarsity Symposium	500
Appendix J	Proceedings of Papers presented to the 1994 International Conference on Ethiopian Studies	515
Appendix K	Conferences attended	543
Appendix L	Proposed Organization Chart for the Ethiopian Tourism Commission	545
Appendix M	Administrative Divisions of Ethiopia - Present	547
Appendix N	Ethiopia: An Adventure (video tape)	549

LIST OF TABLES		Page
1-1	International tourism arrivals, receipts, and world exports, 1980-96	2
1-2	International tourist arrivals, by region; selected years, 1980-1995 (in 000s of arrivals)	3
1-3	Some Sub-Saharan African countries' receipts from international tourists, 1992	4
1-4	Some Sub-Saharan African countries' international tourism receipts as percentage of GDP, 1992	5
1-5	Tourist arrivals from abroad (all origins) in Sub-Saharan Africa and the Indian Ocean, 1988-92 ('000)	6
1-6	Africa - preliminary regional results	7
1-7	1996 Preliminary results	7
2-1	Key indicators: Ethiopia	25
2-2	International tourist arrivals and receipts (1989-93)	27
2-3	Employment in tourism in some countries of the world	28
2-4	Employment in tourism versus other sectors in Australia (1989)	29
2-5	Tourism receipts in some African countries (1989-93)	31
2-6	Contribution of tourism to export earnings of some African countries (1992)	32
2-7	International tourism indicators	32
2-8	Kenya's tourism growth	39
2-9	Central government expenditure	47
2-10	Employment in selected government departments	48
2-11	Number of employees in tourism sector (1989/90)	49
2-12	Contribution of tourism to the national economy	50
2-13	Road network	54
2-14	Road construction five year plan	54
2-15	Road network comparison (1985-1988)	56
2-16	Vehicles registered	58
2-17	Rail traffic	59
2-18	Ethiopian Air Lines international routes	60
2-19	Signatories of bilateral air service agreements	62
2-20	International and domestic passenger growth	63
2-21	Passenger traffic forecast	63
2-22	Ethiopian Air Lines passenger traffic forecast	64
2-23	Passengers on scheduled services	64
2-24	Ethiopian Air Lines aircraft fleet	65
2-25	Aircraft movement forecast	65
2-26	Civil Aviation Authority investment plan 1991-2010	66

2-27	Air transport (1986-1988)	67
2-28	Postal services stations	69
2-29	Letters and parcels handled	69
2-30	Daily newspapers in some African countries	71
2-31	Television sets and radios in some African countries (1992)	71
2-32	Electricity production	72
2-33	Urban water supply (1983/84)	73
2-34	Water supply plan	74
2-35	Medical and health facilities	75
2-36	Medical personnel (excluding Police and Armed Forces)	75
3-1	Accommodation (beds) in some African countries	78
3-2	World capacity hotels and similar establishments - preliminary results	79
3-3	Hotel rooms and beds	79
3-4	Hotel chains	80
3-5	International tourists by length of stay in hotels	80
3-6	International tourist nights in hotels by purpose of visit	81
3-7	Employees in tourism sector (government only)	82
3-8	Foreign exchange revenue from international tourists	82
3-9	Hotel chains which recorded losses in 1990	83
3-10	Hotel chains revenue/employee ratio (1990)	84
3-11	Distribution of hotels	85
3-12	National parks, game reserves and sanctuaries	87
3-13	National parks visitations	88
3-14	Revenues created through parks visitations	88
3-15	Projected parks visitations	89
3-16	National museum visitations	90
3-17	Number of imported and exhibited 35mm long commercial films	91
3-18	NTO hosted tourists	93
3-19	NTO hosted visits to various tourist areas	93
3-20	Foreign exchange earnings by NTO	94
3-21	NTO investment plan	94
4-1	Tourist arrivals and revenue	101
4-2	Tourist arrivals and earnings	102
4-3	Employment statistics (permanent) 1981-1990	108
4-4	Ethiopia - Tourist arrivals (1964-1988)	109
4-5	Ethiopia - Tourism revenue (1964-1988)	110
4-6	Origin of tourists to Ethiopia 1970-1988 (percentage change over previous year)	111
4-7	Changes in tourist arrivals (1987)	112
4-8	Changes in annual tourist arrival rate	112
4-9	Regional share of arriving tourists	113
4-10	International tourist arrivals by purpose of visit (1973-1981)	115
4-11	International visitor arrivals by purpose of visit (1982-1991)	115

4-12	Percentage changes in purposes of visitations	116
5-1	Volume of business of Australian Tour Wholesalers	138
5-2	Number of conferences and participants	140
5-3	Tourist arrivals and receipts in some African countries	143
5-4	International arrivals by region (1986-1991)	147
6-1	Tourist arrivals in Sub-Saharan Africa	150
6-2	Tourism revenues in Sub-Saharan Africa	151
6-3	Tourism's contribution to exports in Sub-Saharan Africa	152
6-4	Stock of tourist facilities in Sub-Saharan African countries	154
6-5	International tourist arrivals by region (1994-1995)	155
6-6	National budget allocation for tourism sector	161
6-7	Tourism budget allocation for promotional activities	162
6-8	Tourism contribution to GDP	162
6-9	Tourism budget allocation for staff training	163
6-10	Tourism promotion offices overseas	163
6-11	Continental distribution of promotional offices	164
6-12	Frequency of supply of promotional materials to wholesalers	164
6-13	Countries supplying materials to tour wholesalers	165
6-14	Private sector participation	165
6-15	Factor that impacts most	166
6-16	Tourism performance	166
6-17	Tourism advisory council	167
6-18	Countries with tourism advisory council	167
6-19	Mode of staff training	167
6-20	Countries mentioning modes of training	168
6-21	Key staff selection criteria	169
6-22	Regional distribution of training scheme	169
6-23	Country distribution of tourist attractions	170
6-24	Inventory of tourist attractions	170
6-25	Geographical distribution/impacting factor	171
6-26	Supply of promotional materials by region	172
7-1	Research activities in Ethiopia	176
7-2	Research activities in Australia	177
7-3	Sub-Saharan African countries which responded to questionnaire surveys	178
7-4	Overseas travel	185
7-5	Visits to Africa	185
7-6	View of Ethiopia	186
7-7	Knowledge of Ethiopia	186
7-8	Essential features for a tourist destination	187
7-9	Is Ethiopia considered a tourist destination?	187
7-10	Knowledge of Ethiopia	188
7-11	Features that impressed most	188
7-12	Could Ethiopia become a tourist destination?	189
7-13	Areas needing improvement?	190
7-14	Consider visiting Ethiopia	190

7-15	Would pass on knowledge about Ethiopia?	191
7-16	Preferred destinations	191
7-17	Questionnaire distribution to Tour Wholesalers in Australia	194
7-18	Profile of respondents	195
7-19	Number of employees	196
7-20	Client base	196
7-21	Geographical area/volume of business	197
7-22	Bases for selecting holiday destination	197
7-23	Knowledge about Ethiopia	198
7-24	Perception about Ethiopia	198
7-25	Source of knowledge	199
7-26	Ratings of tourist features	199
7-27	Areas needing improvement	200
7-28	Changes necessary to adopt a favourable approach	201
7-29	Governments that provide tour operators with tourism promotional materials	201
7-30	Frequency of supply of promotional materials	202
7-31	Comparison of Ethiopia's tourism potential with countries in the region	202
7-32	International airlines flying to and from Ethiopia	203
7-33	Promotional information required in order to "sell" Ethiopia as a tourist destination	203
7-34	Profile of participants	207
7-35	Travel experience	208
7-36	Knowledge of Ethiopia's civilisation	210
7-37	Knowledge of Ethiopia Parts I and II	210
7-38	General description of Ethiopia	211
7-39	Features essential for a tourist destination	212
7-40	Ethiopia considered as a tourist destination Parts I and II	212
7-41	Impressed features	213
7-42	Areas needing improvement	214
7-43	Rating of Ethiopia	214
7-44	Destinations included in itinerary	215
7-45	Passing knowledge gained to others	215
7-46	Alumni members' perception of Ethiopia's tourist features	217
7-47	Respondents' areas of expertise	218
7-48	Travel experience	218
7-49	Income group	219
7-50	Age group	219
7-51	Length of Years Lived	221
7-52	Overseas travel	221
7-53	Profile of those who visited Ethiopia in the last five years	222
7-54	Occupation	223
7-55	Age group	223
7-56	Marital status	223
7-57	Comparison of Ethiopia's facilities with:	224

7-58	Development priority	225
7-59	Tourism development priority/residence status	225
7-60	Tourism development priority/been to Ethiopia	226
7-61	Tourism development priority/occupational category	226
7-62	Tourism development priority/age group	227
7-63	Tourism development priority/residence status	227
7-64	Tourism development priority/place of residence	228
7-65	Tourism development priority/marital status	228
7-66	Tourism development priority/gender	229
7-67	Tourism development priority/years lived in Ethiopia	229
7-68	Tourism development priority/years lived in Australia	229
7-69	Tourism development priority/overseas travel	230
7-70	National budget allocation 1981-1990 (Recurrent and capital, 10-year average %)	231
7-71	Positions of respondents	233
7-72	Importance of tourism	233
7-73	Expected growth in tourist arrival rates	235
7-74	Factors affecting tourism growth	236
7-75	Factor/impact matrix	236
7-76	Promotional budget allocations 1986/87-1990/91	237
7-77	Impact of ethnically based map of Ethiopia	239
7-78	Effect of Eritrea's independence on tourism development in Ethiopia	239
8-1	Variables for strategy development	252
8-2	Environmental threat and opportunity profile	258
8-3	Stake holders exchanges mode	260
8-4	Stake holders objectives	261
8-5	Stake holders benefits	262
8-6	Advantages and disadvantages in stake holder analysis	264
8-7	Stake holders assumptions	268
8-8(a)	Vulnerability analysis - marketing under pinning	272
8-8(b)	Vulnerability analysis - environmental under pinning	273
8-9	Growth vector analysis for the Ethiopian tourism development	274
8-10	Factors determining environmental stability	277
8-11	Factors determining industry strength	277
8-12	Factors determining competitive advantage market share	277
8-13	Factors determining financial strength return on investment	278
8-14	Country risk assessment	281
8-15	Areas of focus	294
8-16	Ethiopia's attractions and their locations	296
8-17	Key result objectives	299
8-18(a)	Planned and actual tourist arrivals	300
8-18(b)	Planned and actual tourist arrivals by purpose	301
9-1	Stepped strategy for Ethiopia's tourism	331

LIST OF FIGURES

	Page	
1-1	The Tourism Development System	11
1-2	Classification of Travellers	20
1-3	Tourist Typology	21
2-1	Tourism Policy Issues	35
2-2	The Ethiopian Alphabet	52
4-1	Ethiopian Tourism Commission Organisation Structure	105
5-1	Internal and external factors	118
5-2	The sales and marketing concepts integrated	120
5-3	The Marketing concept	121
5-4	Tourism marketing strategy	123
5-5	Tourism marketing strategy - product/market matrix	126
5-6	Tourism market segmentation base	131
5-7	Professional competency as %age of total (1987/88)	141
6-1	Inhibitors to tourism development in Sub-Saharan Africa	156
6-2	Regional distribution of respondents	160
8-1	Environmental threat and opportunity matrix	259
8-2	Stake holders of the Ethiopian Tourism Commission	266
8-3	Stake holder assumption impact on strategy	270
8-4	Assumption force-field analysis	271
8-5	Vulnerability assessment graph	273
8-6	Product portfolio matrix	276
8-7	Industry competitive profile	278
8-8	Industry analysis	280
8-9	WOTS-UP matrix	282
8-10	Customer-oriented SWOT model	283
8-11	An old established firm	285
8-12	Origin of key success factors	290
8-13	Controllable and uncontrollable key success factors	295
8-14	SWOT matrix	297
8-15	Managerial factors	302
8-16	Competitive factors	303
8-17	Financial factors	304
8-18	Technical factors	305
9-1	Porter's model showing forces governing industrial competition	309
9-2	Process of choosing and evaluation a strategy	311
9-3	National tourism organisation (NTO) strategy	313
9-4	Destination planning and marketing model	315
9-5	Statement of mission for the Ethiopian Tourism Commission	318
9-6	Strategic audit model for the Ethiopian Tourism Commission	319a
9-7	Strategic alternatives for the Ethiopian tourism development	320
9-8	Strategy development for the Ethiopian tourism industry	323

9-9	Strategic process for tourism development in Ethiopia	325
9-10	Strategic model for government involvement in tourism development in Ethiopia	327
9-11	Strategic model for the Ethiopian tourism marketing plan	329

LIST OF MAPS

		Page
2-1	Map of Kenya	37
2-2	Road map of Ethiopia	55
2-3	The Trans-African highway	57
6-1	Map of Sub-Saharan Africa covered in the survey	159

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This study is dedicated to my family.

QUALIFICATIONS

Education

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ABSTRACT

A Tourism Development Strategy for Ethiopia

Teklehaimanot Shanka Sagaye

This study was concerned with developing a strategy for the Ethiopian Tourism Industry. The literature review attempted to show the significance of tourism to any country, and more appropriately to developing countries. Field research was conducted in Ethiopia to obtain secondary data applicable to the study and to conduct interviews with various officials. Survey questionnaires were administered in Ethiopia, in Sub Saharan African countries and in Australia to elicit perceptions of Ethiopia as a tourist destination. The study contributes in various ways. First, it is the first of its kind to thoroughly investigate Ethiopia's tourism development process. Second, it has looked into the concept of tourism from many angles - strategic, marketing, promotional, infrastructure, environmental, etc. Finally, the strategic models developed for the Ethiopian Tourism industry by incorporating a strategic planning process at various levels can also be used by other less developed countries in their efforts to develop tourism.

CHAPTER 1

1. INTRODUCTION AND PROBLEM DEFINITION

1.1 Introduction

For too long, tourism has been denigrated as somehow not part of the 'real' economy, regarded as unworthy of serious consideration or analysis, and as providing only 'candy floss' jobs [Trippier, 1987:79].

This negative perception of tourism is changing. Smith and Eadington (1992:2) wrote that tourism has become a "major employer, taxpayer, and physical and political presence in many jurisdictions." Gamble (1989:1) indicated that international tourism has become the world's largest and most rapidly expanding economic activity. For instance, in 1985 international tourist arrivals and receipts reached 325 million and US\$105.0 billion, respectively. Sinclair and Stabler (1991:1) wrote,

During the past few decades tourism has emerged as one of the world's major industries, exceeding the importance of many manufacturing industries and other services in terms of sales, employment and foreign earnings.

According to Mak and White (1992:14), International Monetary Fund (1996), and World Tourism Organisation figures international tourist receipts jumped from US\$11.6 billion in 1965 to US\$324.0 billion in 1993, showing a 76.5 per cent annual average growth rate while international arrivals during the same period grew from 112.7 million to 500.0 million, an average annual growth of 10.9 per cent. Table 1-1 shows that during the same period, exports jumped from US\$171.3 billion to US\$3725.8 billion. Tourism receipts over exports for the same period amounted to an annual average of 1.0 per cent.

Table 1-1
International Tourism Arrivals, Receipts, and World Exports, 1980-96

Year	Tourist Arrivals (millions)	Tourist Receipts (\$US billions)	World Exports (\$US billions)	Tourist Receipts/ Exports (%)
1965	112.7	11.6	171.3	6.8
1966	119.8	13.3	187.8	7.1
1967	129.5	14.5	197.2	7.4
1968	130.9	5.0	220.4	6.8
1969	143.1	16.8	251.8	6.7
1970	159.7	17.9	288.6	6.2
1971	172.2	20.9	325.5	6.4
1972	181.9	24.6	388.7	6.3
1973	190.6	31.1	538.8	5.8
1974	197.1	33.8	804.8	4.2
1975	214.4	40.7	829.1	4.9
1976	220.7	44.4	942.3	4.5
1977	239.1	55.6	1,066.3	5.2
1978	257.4	68.9	1,233.6	5.6
1979	274.0	83.3	1,574.5	5.3
1980	284.8	102.4	1,901.2	5.4
1981	288.8	104.3	1,869.5	5.6
1982	286.8	98.6	1,719.2	5.7
1983	284.4	98.5	1,685.7	5.8
1984	312.4	109.8	1,784.5	6.2
1985	322.7	116.2	1,807.8	6.4
1986	330.5	139.2	1,990.4	7.0
1987	356.8	170.5	2,347.9	7.3
1988	381.9	196.5	2,686.2	7.3
1989	414.2	209.4	2,891.7	7.2
1990	425.0	230.0	3,425.0	6.7
1991	456.0	260.0	3,478.0	7.5
1992	481.0	296.0	3,727.5	7.9
1993	500.0	324.0	3,725.8	8.7
1994	546.3	346.7	n.a.	
1995	567.0	371.7	n.a.	
1996 *	592.1	423.1	n.a.	
*preliminary				

Sources: Mak and White (1992); International Monetary Fund (1996), and World Tourism Organisation in Vellas and Becherel (1995); World Tourism Organization (1997)

The foregoing suggests that the economic importance of tourism to a country is beyond any doubt. Mill and Morrison (1985:222) indicated,

Tourism development has been advanced as a policy alternative, particularly for developing countries, to aid economic growth ... First, the demand for international travel continues to grow in developed countries. Second, as incomes in the developed

countries increase, the income elasticity of demand for international travel will mean that it will increase at a faster rate. Third, developing nations need foreign exchange earnings to aid their own economic development to satisfy the rising expectations of their growing population.

As Jenkins and Henry (1982:504) reiterated, most developing countries regard tourism as a panacea to relieve some of the constraints on the development process. International tourist arrivals in Africa grew astronomically by 175.2 per cent between 1980 and 1995, ie. from 7.07 million arrivals to a high of 19.4 million, only to be surpassed by East Asia/Pacific region which showed an increase of 351.2 per cent over the period as shown in Table 1-2.

Table 1-2
International Tourist Arrivals, by Region; Selected Years, 1980-1995
(000s)

	Africa	Americas	East Asia/ Pacific	Europe	Middle East	South Asia
1950	524	7,485	-	16,808	-	47
1960	1,035	16,705	-	50,117	-	180
1970	2,842	36,648	-	112,008	-	912
1980	7,070	53,703	19,967	196,000	5,821	2,280
1981	8,046	53,464	23,446	195,289	6,160	2,443
1982	7,826	50,799	20,067	197,759	7,907	2,422
1983	8,210	51,014	22,318	192,828	7,316	2,487
1984	8,916	59,390	26,561	207,628	7,473	2,466
1985	9,805	58,728	29,408	214,263	7,979	2,540
1986	9,488	62,894	33,128	215,396	6,890	2,731
1987	9,986	67,986	38,372	230,752	6,984	2,707
1988	12,646	74,991	44,703	239,347	7,379	2,880
1989	13,604	78,456	44,387	266,946	7,775	3,055
1990	14,000	84,000	46,500	271,250	6,000	3,250
1991	15,842	96,947	53,924	279,836	6,674	3,279
1992	17,552	101,080	61,306	290,304	7,921	3,509
1993	17,875	106,525	68,525	296,535	7,200	3,459
1994	18,477	107,176	76,973	329,819	9,875	3,949
1995	18,800	111,944	83,624	337,240	11,041	4,384
1996 *	19,454	115,511	90,091	347,437	15,144	4,485
% change 1996/80	175.2	115.1	351.2	77.3	160.2	96.6

* preliminary figures

Sources: Harrison (1992); World Tourism Organisation in Vellas and Becherel (1995); and World Tourism Organization (1997)

Tourism contribution to Sub-Saharan African countries suggests that the industry's role is very significant. In Kenya, for example, the tourism industry has rapidly become of central importance to the country's economic health.

[Economist Intelligence Unit (EIU), 1991:50]. EIU indicated that between 1980 and 1989 Kenya's tourism earnings as a percentage of commodity earnings grew from 17.2 to 43.2 percent. Table 1-3 shows that the contribution of tourism to export earnings of Kenya, Mauritius, Senegal, Tanzania, Togo and Sierra Leone was very significant, although the contribution to export earnings of The Congo, Gabon, Burkina Faso, Cameroon and Nigeria was less than one percent. Ethiopia, on the other hand, registered a 5.08 per cent contribution of tourist receipts to exports. On average, tourism contributed about 6.97 per cent of export earnings to the above countries in 1992.

Table 1-3
Some Sub-Saharan African Countries' Receipts from
International Tourism, 1992

Countries	Exports (\$Um)	Tourist Receipts (\$USm)	Tourist Receipts as % of Exports
Burkina Faso	2,464	9	0.36
Cameroon	2,341	18	0.77
Congo	1,177	6	0.51
Cote D'Ivoire	3,396	53	1.56
Ethiopia	453	23	5.08
Gabon	2,606	5	0.19
Kenya	2,154	442	20.52
Madagascar	500	39	7.80
Malawi	417	11	2.64
Mauritius	1,913	299	15.63
Niger	332	17	5.12
Nigeria	11,617	29	0.25
Senegal	1,402	172	12.27
Sierra Leone	172	17	9.88
Tanzania	554	120	21.67
Togo	456	39	8.55
Zimbabwe	1,833	105	5.73

Sources: World Bank (1996) African Development Indicators; United Nations (1994) Statistical Yearbook

As Hubbard (1990) indicated, between 1980 and 1988 revenue from international tourists visiting sub-Saharan Africa rose from \$2.7 bn to \$4.5 bn, with tourism revenue averaging 6 per cent of export earnings in 1988, compared with 2.8 per cent in 1980. Table 1-4 shows tourist receipts' contribution to the GDP of selected Sub-Saharan African countries in 1992.

Table 1-4
Some Sub-Saharan African Countries' International Tourism Receipts as Percentage of GDP, 1992

	GDP (\$USm)	Tourist Receipts (\$USm)	Tourist Receipts as % of GDP
Congo	2,557	6	0.23
Ethiopia	7,312	23	0.31
Gabon	4,373	5	0.11
Kenya	9,296	442	4.75
Malawi	1,319	11	0.83
Mauritius	2,422	249	10.28
Niger	2,279	17	0.75
Nigeria	37,260	29	0.08
Zimbabwe	6,205	145	2.34

Source: World Bank (1996) African Development Indicators

As can be seen from Table 1-4 contribution of tourist receipts to the GDP of Mauritius was 10.28 percent, that of Kenya was 4.75 and Ethiopia's figure showed only a 0.31 percent contribution.. Between 1990 and 1992 international tourist arrivals in sub-Saharan Africa and the Indian Ocean grew by 63.7 per cent. Some countries, such as, Gabon, Benin, South Africa and Lesotho recorded the highest changes while Sudan, Togo, Niger, Cameroon, Burundi, Nigeria, Burkina Faso, Congo and Senegal recorded negative growth ranging from minus 59 per cent to minus 4 per cent. As Table 1-5 shows Gabon recorded a 540 per cent change between the two periods Ethiopia registered a 9 per cent change over the period.

Table 1-5
Tourist Arrivals From Abroad (All Origins) In Sub-Saharan Africa And The Indian Ocean, 1988-1992 ('000)

Country	1988	1989	1990	1991	1992	% Change 1992/1988
South Africa	805	930	1,029	1,709	2,892	259.0
Kenya	695	735	814	817	698	0.4
Zimbabwe	449	474	606	664	757	68.0
Botswana	384	691	844	899	916	138.0
Nigeria	306	161	226	308	272	-11.0
Senegal	255	259	246	233	245	-4.0
Swaziland	184	235	263	264	na	43.5 a
Mauritius	239	263	291	301	335	40.0
Tanzania	130	138	153	187	202	55.0
Cote D'Ivoire	177	192	196	200	217	23.0
Cameroon	100	87	100	70	62	-38.0
Ghana	114	125	146	172	na	50.9 a
Lesotho	165	216	242	357	417	153.0
Zambia	108	113	141	171	159	47.0
Togo	103	115	103	65	48	-53.0
Burundi	99	81	109	125	86	-13.0
Seychelles	77	86	104	90	98	27.0
Gambia	101	86	101	114	na	13.0 a
Ethiopia	76	77	79	81	83	9.0
Burkina Faso	83	79	74	80	74	-11.0
Reunion	na	182	200	186	217	19.0 b
Benin	75	75	248	401	433	477.0
Congo	39	33	32	33	37	-5.0
Madagascar	35	39	53	35	53	51.0
Mali	36	32	44	38	38	5.0
Niger	33	23	21	16	na	-51.0 a
Gabon	20	113	108	128	na	540.0
Chad	20	12	9	20	na	0.0
Comoros	7	13	7	17	19	171.0

a = 1991/1988
na = data not available

Source: United Nations Statistical Yearbook 1994

According to the World Tourism Organization reports (1996) between 1994 and 1995 Africa witnessed a 1.7 per cent increase in tourist arrivals and 6.0 per cent increase in tourist receipts. Southern Africa was the fastest growing destination while political and military disturbances and health apprehension in some sub-Saharan destinations have acted negatively on the overall image of Africa as a tourist destination. Table 1-6 shows preliminary results for the region.

Table 1-6
Africa - Preliminary Regional Results

	Tourist arrivals (thousands)		% Change		Tourist receipts (US\$ million)		% Change	
	1994	1995	95/94	94/93	1994	1995	95/94	94/93
TOTAL AFRICA	18,477	18,800	1.7	0.7	6,530	6,915	5.9	8.5
Eastern	3,663	3,924	7.1	6.5	1,535	1,627	6.0	17.8
Middle	276	269	-2.5	-8.9	121	115	-5.0	4.3
Northern	8,138	7,332	-9.9	-7.8	2,585	2,702	4.5	7.0
Southern	4,929	5,772	17.1	12.5	1,689	1,866	10.5	8.2
Western	1,471	1,503	2.5	5.5	600	605	0.8	3.8

Source: World Tourism Organization (1996)

The WTO preliminary results show that arrivals and receipts in Africa grew by 2.3 per cent and 9.2 per cent, respectively, over the 1995 figures. Table 1-7 shows this result with the Middle East in the forefront in both arrivals and receipts.

Table 1-7
1996 Preliminary Results

	Arrivals (tousands)	% Change 96/95	Receipts (million US\$)	% Change 96/95
WORLD	592,122	4.6	423,116	7.6
Europe	347,437	3.6	214,474	5.9
Americas	115,511	4.3	106,378	6.1
East Asia/Pacific	90,091	8.3	82,436	13.3
Africa	19,454	2.3	7,622	9.2
Middle East	15,144	10.5	8,243	14.7
South Asia	4,485	4.3	3,963	8.8

Source: World Tourism Organization (1997)

The foregoing sections looked at the significance of tourism in the world. Various countries have benefitted from tourism receipts both in terms of export earnings and as contribution to GDP.

1.2 Objectives of the Study

This thesis attempts to serve two purposes: (1) to show that tourism, as a fast growing economic sector, can contribute to a country's development; (2) to suggest a strategy of how Ethiopia might develop tourism.

1.3 Importance of the Study

This study is important in various ways. First, tourism is becoming the fastest growing industry. It can provide Third World countries with much needed foreign exchange [Kale and Weir, 1986; Cater, 1987]. Rowe et al (1989) indicated that tourism is a major contributor to Australia's economic and cultural growth, making Australia the world's tourism success story. Second, as Smyth (1986), Witt and Moutinho (1989) as well as Yong, Keng and Leng (1989) correctly addressed, tourism has a marked impact on employment, on balance of payments and on economic stability for many countries. Wyer, Towner, Millman and Hutchinson (1988) as well as Witt and Moutinho (1989) indicated that tourism is labor intensive and hence a particularly good potential source of employment, offering a relatively high proportion of job opportunities to the lower skilled occupations where unemployment tends to be concentrated. Third, as Kaynak and Macaulay (1984) as well as Edgell (1987) indicated, by the Year 2000 tourism may be the world's major economic activity, not only in developed but also in developing countries. Few industries have as much impact on the economy of a nation, region, or area as that of the tourist industry. Fourth, it is regrettably a fragmented economic activity calling for a closer co-ordination of the various sectors of a developing economy [Kaynak, Odabasi and Kavas, 1986]. Fifth, Ethiopia, as a developing country with rich natural

as well as man-made attractions would benefit from tourism development [Ankomah and Crompton, 1990]. The study assists in identifying key success factors, perceptions of Ethiopia as a tourist destination, the government's role in tourism development, as well as capacities of tourist facilities. As an important economic sector that employs a large labour force and a foreign exchange earner in a fast growing industry, tourism needs to be studied in great depth for the benefit of the country.

At this juncture, it is appropriate to indicate some socio-cultural impacts of tourism to a country. Tourism has both positive as well as negative sides. Tourism-related social changes can lead to development, representing socio-cultural advances in the community, an improvement in the standard of living, and an overall social and cultural enrichment [Ross, 1994]. On the other hand, changes can lead to dependency. The social costs may include a shift in local population and employment structures, an increase in crime, commercialisation of culture, religion and the country [Glasson, Godfrey and Goodey, 1995]. As Kotler, Bowen and Makens (1996) indicated mass tourism can destroy the local culture as in the case of Bali where tourism is destroying its culture as farmland becomes resorts and new jobs unravel family values. Haralambopoulos and Pizam (1996) studied the Greek island of Samos and concluded that high prices of goods and services, drug addiction, vandalism, brawls, sexual harassment and crimes were associated with tourism. As Lundberg and Lundberg (1993) indicated the Seychelles Islands found that some changes brought by tourism shook up the moral structure as well as the economy of the Islands. While it is inevitable that there may be some social costs of tourism the benefits generated by developing tourism should also be appreciated. These may include employment opportunity, revival of crafts and artefacts through cottage industries, an awareness and pride in local culture and traditions, and cultural conservation [Holloway, 1994; World Tourism Organisation, 1994; Vellas and Becherel, 1995].

1.4 Motivations for the Study

A number of Less Developed Countries (LDCs) endowed with abundant tourism attractions fail to capitalise on these resources in order to improve their export earning capabilities. Lack of strategic objectives has been a drawback in some countries. Others suffer from negative perceptions of their destinations due mainly to unstable political situations, lack of security, poor facilities, etc. In all, the most viable way of developing tourism is by adopting a strategic approach. The literature reveals that the role of government in tourism development is of paramount importance. All the surveys conducted suggest that a destination's image has to be improved in order to attract international tourists. Moreover, the availability of quality products and a stable political situation, are essential prerequisites. Destinations lacking in these elements are bound to suffer from unmarketable tourist products.

1.5 Scope of the Study

This study is concerned with tourism development in the context of Less Developed Countries with specific focus on Ethiopia. This emanates from experience with the country and perception of its problems as a citizen. It does not mean that Ethiopia is representative of the LDCs nor does it mean that what works for Ethiopia will equally work for others. However, the conceptual framework and strategic approach will also be of benefit to the LDCs. This study, furthermore, does not intend to present tourism as a panacea for the country's economic problems. Instead, it is hoped that tourism will complement other development programs. Finally, it is not the purpose of this study to criticise past and existing approaches to tourism development in Ethiopia. Having stated the problem and having shown the scope, it is imperative to present pertinent definitions of tourism in the related literature.

1.6 Related Literature

Tourism is a composite of activities, services, and industries that delivers a travel experience, namely, transportation, accommodation, eating and drinking establishments, shops, entertainment, activity facilities, and other hospitality services for individuals or groups that are travelling away from home [McIntosh and Goeldner, 1990:4]. These interactive processes are shown in Figure 1-1.

**Figure 1-1
The Tourism Development System**

SECTOR			
Level	Private	Government	Associations
International	Developers Investors/Financiers Hotel Chains Airlines Tour Wholesalers Shipping Companies Travel Companies Bankers Credit Card Companies Marketing Companies Hire Car Companies	United Nations Airlines	World Tourism Organisation International Hotels Association IATA UFTAA Civil Aviation Organisation
National	Tour Wholesalers Tour Operators Airlines Hotel/Motel Chains Travel Agents	Tourism Recreation and Sport Aviation Tourist Commission Parks and Wildlife Environment Trade and Industry Airlines Railways Highways	Travel Agents Tourist Industry Inbound Tour Operators National Trust Conservation

**Figure 1-1
The Tourism Development System (Continued)**

State	Regional Airlines Bus Operators Travel Agents Hire Car Companies Convention Centres Casinos	Tourism Development Transport Parks and Wildlife Arts Environment and Planning Highways Sports and Recreation Highways TAFE	Restaurateurs Motels Bus Operators Tourist Operators
Local	Museums Motel/Hotels Caravan Parks Amusement Parks Bus Operators Craft Shops Tourist Offices Taxis Yacht Hire Cabin/Guest Houses Wineries Retail Stores Sightseeing Attractions Restaurants/Cafes Resorts Pioneer Villages Travel Agents Wildlife Parks	Towns/City Councils Caravan Parks Information Centres	Tourist Association Area Tourist Association of Chamber of Commerce Local Trader Association Historical Association Sporting Clubs

Source: Adapted from Jackson (1989) *An Introduction to Tourism*, pp 28-29

All levels of the system - international, national, state and local have significant roles in the development of tourism. Moreover, tourism development requires the full participation of local community, public and private sectors. Further afield, neighbouring countries, regional destinations and countries of the world individually and collectively participate in the tourism system. At the regional level regional organisations can play a catalyst role while at international level the co-ordinating body, that is, World Tourism Organisation, plays a significant role in the system.

World Tourism Organisation (1988) indicated that while there exists a bewildering number of studies dealing with economic development, more particularly in relation to the countries of the Third World, far too little critical attention seems to have been paid to the role tourism can play in stimulating the economic and social enhancement of the countries, many of which depend for their export earnings on a few, or a single commodity, whose price is subject to violent fluctuations on world markets. Ritchie and Goeldner (1987) indicated that because tourism is a relatively new industry, it has not had the opportunity to establish the infrastructure necessary to systematically attract and train its fair percentage of the best minds and most ambitious, most effective managers. Among the studies carried out in the last thirty years, the great majority have been undertaken by economists, sociologists, anthropologists, and geographers [Dann, Nash and Pearce: 1988; Pearce: 1987; Williams and Shaw: 1987]. However, recently, focus on the strategic planning of tourism has started to emerge. As Papadopoulos (1989b:42) indicated, the main aim of tourism strategy is to pull together tourism management's decisions regarding their objectives, target markets, and marketing mix programs in conjunction with the organisation of resources and allocation of responsibilities in carrying out specific marketing activities and tasks. Papadopoulos further reiterated that the corporate strategy depends on the national tourist organisation concerned and the overall role the tourist industry plays in a country's economic development and priority given by its government with other economically significant sectors.

1.7 Conceptual Definition

Several definitions have been forwarded for tourism. Heath and Wall (1992:4), for example, wrote, "tourism usually denotes forms of recreation that take place beyond a specified distance from the home or in an administrative jurisdiction different from one's place of permanent residence." While Mill (1990:17) defined tourism as "an activity engaged in by people who travel", the definition of tourism has been conceptualised by the International Association of Scientific Experts in Tourism

(AIEST) in 1979 with five main characteristics: (a) tourism arises from a movement of people to, and their stay in, various destinations; (b) there are two elements in tourism: the journey to the destination and the stay, including activities at the destination; (c) the journey and the stay take place outside the normal place of residence and work, so that tourism gives rise to activities, which are distinct from those of the resident and working population of the places, through which tourists travel and in which they stay; (d) the movement to destinations is of a temporary, short-term character, with intention to return within a few days, weeks or months, and (e) destinations are visited for purposes other than taking up permanent residence or employment remunerated from within the places visited.

Burkart and Medlik (1974:39-40) conceptualised five main characteristics of tourism. These are: (a) because of its complexity, tourism is an amalgam of phenomena and relationships, rather than a single one; (b) these phenomena and relationships arise from a movement of people to, and their stay in, various destinations and in this there is a dynamic element - the journey - and a static element - the stay; (c) the journey and stay are to and in destinations outside the normal place of residence and work, so that tourism gives rise to activities which are distinct from those of the resident and working population of the places through which tourists travel and in which they stay; (d) the movement to destinations is of a temporary, short-term character with intention to return within a few days, weeks, or months, and (e) destinations are visited for purposes not connected with paid work, that is not to take up employment and not for business or vocational reasons. The United Nations Economic and Social Council (1992:8) conceptualised tourism as, "...the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes". Mathieson and Wall (1987:2) defined tourism as the temporary movement of people to destinations outside their normal place of work and residence, the activities undertaken during their stay in these destinations and the

facilities created to cater for their needs. Tourism can therefore, be presented in several forms: according to the number of people travelling (eg. individual or group tourism); according to the purpose served by travel (eg. cultural, health, sport, or conference tourism); according to the means of transport (eg. land, sea and river, and air tourism); according to geographical locality (eg. domestic, regional, or international tourism); according to age (eg. youth, adult); according to sex (eg. masculine, feminine), according to prices and social class (eg. deluxe, middle-class, social tourism). [Wahab, 1975; Holloway, 1994].

1.8 Common Elements in the Definition of Tourism

Tourism, therefore can technically be defined on the bases of purpose, time (length of stay), particular situations. Pearce (1992:4) indicated that tourism might be seen as an origin-linkage - destination system involving the temporary movement of people from an origin to a destination (or destinations) and usually back home again after at least one overnight stay. Hudman and Hawkins (1989:5) indicated that definitions of tourism have three common elements at either domestic or international level, which include movement between two or more places (origin and destination); purpose; and time (temporary). Hall (1991:6) suggested that the definitions of tourism share a range of common elements, such as (a) tourism is the temporary, short-term travel of non-residents, along transit routes to and from a destination; (b) it may have a wide variety of impacts on the destination, the transit route and the source point tourists; (c) it may influence the character of the tourist, and (d) it is primarily for leisure or recreation, although business is also important. Hudman and Hawkins (1989:4) identified perspective such as the tourist, the business providing tourist goods and services, the tourist government (tourist generator), the government of the host community or area, and the host community, as important in the development of tourism. McIntosh and Goeldner (1990:4) also mentioned these perspective in exception to the tourist government. Based on the perspective McIntosh and Goeldner (1990:4) defined tourism as the sum of the

phenomena and relationships arising from the interaction of tourists, business suppliers, host governments, and host communities in the process of attracting and hosting these tourists and other visitors.

1.9 Definitions of a Tourist

The Australian Bureau of Industry Economics (BIE) (1991:7) report defined tourism as "overnight and certain day trips undertaken by Australian residents and all visitors to Australia by overseas residents of less than twelve months' duration" and on this basis defined a tourist as (a) a person who undertakes travel, for any reason, involving a stay away from his or her place of residence for at least one night; or, (b) a person who undertakes a pleasure trip involving a stay away from home for at least four hours during daylight, and involving a round distance of at least 50 kilo metres; however, for trips to national parks, state and forest reserves, museums, historical parks, animal parks or other man-made attractions, the distance limitation does not apply. The United Nations Conference on International Travel and Tourism in 1963 decided that a visitor is any person visiting a country other than that in which he has his usual place of residence, for any reason other than following an occupation remunerated from within the country visited. Accordingly, a visitor can be classified in two categories: **a tourist**: a temporary visitor staying at least 24 hours in the country visited and the purpose of whose journey can be classified as leisure, business, family, mission, and meeting; **an excursionist**: a temporary visitor staying less than 24 hours in the destination visited and not making an overnight stay. [World Tourism Organisation, 1981]. The World Tourism Organisation (WTO) refined the definition of a tourist to include not only holiday makers, but also visitors to a country for business, meetings, conferences and conventions, visiting friends and relatives (VFR), study, religion and others.

By the same token, an international tourist was defined by several authorities: first, the League of Nations definition suggests that a foreign tourist is any person visiting

a country, other than that in which he usually resides for a period of at least 24 hours. Individuals considered tourists included persons travelling for pleasure, for family reasons, for health, etc.; persons travelling to meetings, or in representative capacity of any kind (scientific, administrative, diplomatic, religious, athletic, etc.); persons travelling for business reasons; persons arriving on a sea cruise, even when they stay less than 24 hours. Individuals considered not tourists included persons arriving, with or without a contract of work, to take up an occupation or engage in any business activity within that country; other persons arriving to establish a residence in that country; students and other persons in boarding establishments or schools; residents in a foreign zone and persons domiciled in one country and working in an adjoining country; travellers passing through a country without stopping, even if the journey takes more than 24 hours. [OECD, 1990:17]. Second, IUOTO proposed the following amendment for the above definitions. Individuals considered tourists are students and young persons in boarding establishments or schools. Individuals considered not tourists included excursionists and transit travellers. [WTO, 1991:18]. Third, The United Nations Rome Conference defined a visitor is any person who visits a country other than the one in which he or she lives for any purpose other than one which involves pay from the country being visited. Visits could be for leisure, recreation, holiday, sport, health, study, religion; business, family, friends, mission, meetings. Fourth, The United Nations Statistical Commission while accepting the definitions under No.3 above, recommended that member-nations decide for themselves whether to use the term "excursionist" or "day visitor" [Mill, 1990:19].

Fifth, according to The United Nations Department of Economic and Social Affairs definition international visitors are those who visited a given country from abroad (inbound tourists) and those who went abroad on visits from a given country (outbound tourists) for a maximum period of one year. [Mill, 1990:19]. Sixth, The World Tourism Organisation defines an international tourist as someone who spends

at least one night, but no more than one year, in a country other than his or her own for a variety of reasons other than pay from the country being visited. An excursionist is one who meets the above description but does not stay overnight. [Mill,1990:20]. Seventh, McIntosh and Goeldner's defined a tourist as a person who travels from place to place for non-work reasons, stays for more than one night and less than a year. Excluded are military personnel, diplomats, immigrants, and resident students. An excursionist is a traveller who spends less than 24 hours at a destination. Lastly, the Ethiopian Tourism Commission defines a tourist as any person irrespective of nationality who spends at least a night in a place other than his usual environment and whose purpose of movement could be classified under: (a) pleasure, holidays, culture, sports activity, visit to relatives and friends; (b) professionals, meeting, mission, business; (c) other purposes, studies, health, pilgrims [Ethiopian Tourism Commission, 1991].

1.10 Domestic Tourist Defined

First, the World Tourism Organisation defined a domestic tourist as any person residing within a country, irrespective of nationality, travelling to a place within this country other than his usual residence for a period of not more than 24 hours or one night for a purpose other than the exercise of a remunerated activity in the place visited. The motives for such travel may be leisure (recreation, holidays, health, studies, religion, sports); business, family, meetings. Second, according to the National Tourism Resources Review Commission (USA) definition domestic tourist was one who travelled away from home for at least 50 miles one way for any reason except commuting to work. [Mill, 1990:21]. Third, the Canadian Government defined a domestic tourist as one who travels at least 25 miles outside his or her community. [Mill, 1990:21]. Boniface and Cooper (1987) defined domestic tourists as those travelling within their own country.

1.11 Common Classifications of Travellers

Tourism can be divided into many forms on the basis of length of stay, type of transport used, price paid or the number of travellers in the group. From a geographical point of view distinctions are made between international tourism and domestic tourism. [Boniface and Cooper, 1987:2]. Smith (1989:22) indicated that there is no consensus on a comprehensive definition of the various types of travellers, tourists, and excursionists. For this reason he outlined the most approximate of the many definitions forwarded by different authors.

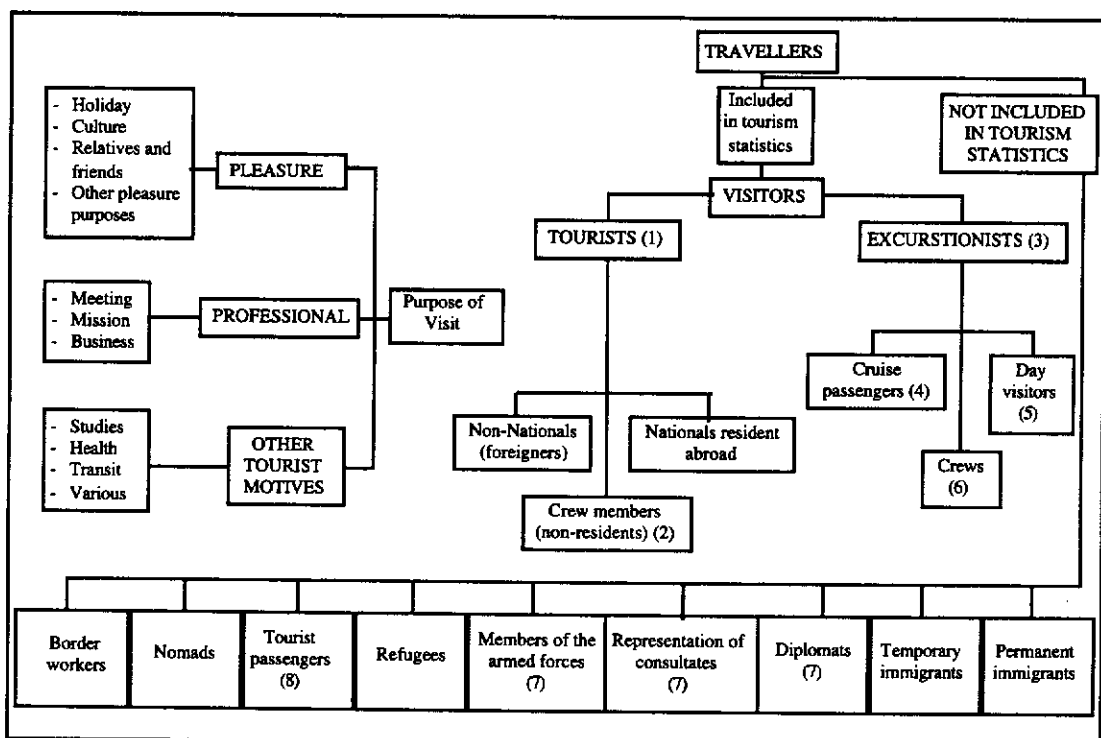
- I. Travellers relevant to the tourism industry
 - A. Tourists (trips lasting for more than 24 hours)
 - 1. International
 - (a) Intercontinental
 - (b) Intra-continental
 - 2. Domestic
 - (a) Inter-regional
 - (b) Intra-regional
 - B. Excursionists (trips lasting less than 24 hours)
 - 1. International
 - 2. Domestic
 - 3. Passengers and crews of airlines and cruise ships stopping for a few hours in a port of call, or who spend the night aboard the cruise ship and visit the port of call only during the day
- II. Travellers not relevant to the tourism industry
 - A. Business-related
 - 1. Commuters
 - 2. Migrant workers and those searching for work
 - 3. Refugees

4. Military personnel
5. Crews of airlines and commercial ships (sometimes included as a type of excursionist)

B. Students travelling to an educational institution (study trips are often considered as part of tourism)

The foregoing classification schemes can best be summarised in Figure 1-2. The World Tourism Organisation (WTO) presented the most comprehensive scheme. According to the WTO scheme, travellers are categorised into two groups - those included in tourism statistics and those not included in tourism statistics. The classification of tourists and excursionists can also be based on the purpose of their visit.

Figure 1-2
Classification of Travellers



Keys

1. Visitors who spend at least one night in the country visited
2. Foreign air or ship crews docked or in lay over and who use the accommodation establishments of the country visited
3. Visitors who do not spend the night in the country visited although they may visit the country during one day or more and return to their ship or train to sleep
4. Normally included in excursionists. Separate classification of these visitors is nevertheless recommended

5. Visitors who come and leave the same day
6. Crews who are not residents of the country visited and who stay in the country for the day
7. When they travel from their country of origin to the duty station and vice versa (including household servants and dependants accompanying or joining them)
8. Who do not leave the transit area of the airport or the port. In certain countries, transit may involve a stay of one day or more. In this case, they should be included in the visitors statistics.

Source: World Tourism Organisation

1.12 Tourist Typology

A typology of tourists developed by Smith (1977) and Cohen (1979) attempted to distinguish between travellers who are tourists and those who are not. The two basic models developed were referred to as "interactive" and "cognitive-normal" models. The "interactive" model takes the form of behaviour travellers at their destinations while "cognitive-normal" model focuses on the causes of travel [Smith: 1977; Cohen: 1979]. Components of both typology as developed by both authors are shown in Figure 1.3:

**Figure 1-3
Tourist Typology**

Smith Model	Cohen Model
Explorer	Recreational
Elite	Diversionary
Off-beat	Experiential
Unusual	Experimental
Incipient mass	Existential
Mass	
Charter	

Plog (1972, 1987) used psychographic as a segmentation method for the cognitive-normative model. Hence he segmented them as "allocentric" and "psychocentric". Allocentric are interested in new experiences and are adventuresome, motivated by educational and cultural factors. In contrast, as Getz (1991:88) indicated, psychocentrics require security and are less adventuresome. They tend to travel by car to nearby, popular destinations or attractions or to take fully packaged holidays. Getz (1991:88) further indicated that the "interactive" focus on visitor-destination interaction while the "cognitive-normative" focus on travel motivations.

1.13 Basic Approaches to the Study of Tourism

Although a variety of methods has been applied in the study of tourism, to date there has not been a common denominator as to how the study should be undertaken. However, McIntosh and Goeldner (1990:10-14) identified the following methods as being currently applied: (1) **the institutional approach** which involves intermediaries and institutions that perform tourism activities such as travel agencies; (2) **the product approach** which involves the study of various tourism products and how they are produced, marketed, and consumed. Examples may include airline seats, rental cars, hotel rooms, meals; (3) **the historical approach** involves an analysis of tourism activities and institutions from an evolutionary angle searching for the cause of innovations, growth or decline, shifts in interest, etc.; (4) **the managerial approach** is firm oriented (micro-economic), focusing on the management activities necessary to operate a tourist enterprise, such as planning, research, pricing, advertising, control, and the like; (5) **the economic approach** because of its importance to both domestic and world economies, tourism has been closely examined by economists who focus on supply, demand, balance of payments, foreign exchange, employment, expenditures, development, multipliers, and other economic factors; (6) **the sociological approach** because of its tendency to be a social activity, tourism has attracted the attention of sociologists who have studied the tourism behaviour of individuals, groups of people and the impact of tourism on society; (7) **the geographical approach** focuses on location of tourist areas, movements of people created by tourism places, changes that tourism brings to the landscape in the form of tourism facilities, dispersion of tourism development, physical planning, and economic, social, and cultural problems; (8) **the interdisciplinary approach** because tourism embraces virtually all aspects of our society, the interdisciplinary approach focuses on anthropological, psychological, political science, and legal approaches, and lastly **the systems approach** which integrates the above approaches into a comprehensive method dealing with both macro and micro issues such as the firm's competitive environment, market, results,

linkages, the consumer, the entire tourism system of a country, state or area and how it operates within and relates to other systems, such as legal, political, economic and social systems.

1.14 Conceptual Framework for Tourism Development

Having identified various definitions for tourism, tourist (domestic and international) and approaches to tourism development a simple framework that clearly identifies who the tourist is useful for this study. For the purpose of this study a tourist is any person who travels from his/her normal place of residence for leisure (recreation, health, sport, holiday, study or religion), or for business, family, mission or meeting. The travel can last between 24 hours and 12 months. The tourist is not expected to engage in any activity for remuneration at the place of visit. Further, a tourist can be either domestic or international. On the other hand, if the travel is only for less than 24 hours the visitor is classified as an excursionist.

1.15 Summary and Conclusion

The general research methodology for this study was based on the strategic management principles of Rowe et al (1989) as well as Papadopoulos (1989b). The approach is consistent with the purpose of this thesis which attempts to develop a tourism strategy for Ethiopia. An evaluation of empirical studies in tourism over the last ten years indicates that descriptive statistics were most widely used. [Reid and Andereck, 1989]. Pizam (1987:70) also indicated that in tourism, like in most other social sciences, the problems do not lend themselves to experimental designs. In conclusion, extensive literature was presented in subsequent chapters.

1.16 Outline of the Study

The remainder of this study is structured as follows: Chapter 2 discusses environment of tourism including an overview of Ethiopia, historical role of tourism in the Ethiopian economy, and the country's infrastructure. In addition, a case study

on Kenya's tourism development is discussed here. Chapter 3 discusses tourist facilities including accommodation, travel agencies, entertainment, attractions, etc. Chapter 4 discusses the historical development of tourism in Ethiopia. Chapter 5 discusses the marketing of tourism. It contrasts tourism marketing with manufactured products marketing. It deals with market segmentation, roles of government and promotional strategy. Chapter 6 looks into tourism development in Sub-Saharan African countries. Chapter 7 discusses the research. This includes types of research, personal interviews as well as questionnaire surveys and their findings. Chapter 8 covers strategy analysis and focuses on key success factors and SWOT analysis. It also specifically deals with identification of various processes of strategy development. Chapter 9 presents various strategy models that could be adopted for Ethiopia. Chapter 10 discusses implementation strategy while Chapter 11 discusses the summary, implications, limitations and conclusion of the study.

CHAPTER 2

ENVIRONMENT FOR TOURISM

2.1 Introduction

Ethiopia is located on the Horn of Africa between latitude 3 degrees north to latitude 18 degrees north and longitude 33 degrees east to longitude 48 degrees east with approximately equal east-west and north-south dimensions [Central Statistical Authority, 1990:1]. It borders with the Sudan in the west, Kenya in the south, Somalia and the Republic of Djibouti in the east, and Eritrea in the north [Appendix M]. Featuring a central highland mass surrounded by lowlands, Ethiopia has a total land area of 1,251,282 square kilo meters with a population of 56.9 million [The World of Information, 1996:71]. Table 2-1 shows the key indicators of Ethiopia.

Table 2-1
Key Indicators

Indicators	Unit	Years				
		1989	1990	1991	1992	1993
Population	million	49.5	51.5	52.8	54.2	56.9
Gross National Product	US\$ million	5,960	6,040	6,144	5,400	6,000
GNP per capita	US\$	126	120	110	100	110
Inflation	%	7.9	5.2	20.9	21.0	*10.0
Exports (FOB)	Birr million	911.5	615.8	390.5	448.4	-
Coffee	Birr million	605.4	271.3	-	186.5	-
% of coffee/exports		66.4	44.0		41.6	
Imports (CIF)	Birr million	1,967.7	2238.5	976.8	2,604.2	-
Balance of trade	US\$ million	-374.0	-620.0	-303.0	-823.0	-
Current account	US\$ million	-144.5	-302.5	-173.9	-119.8	-
Total external debt	US\$ million	3,013.0	3,250.0	7,758.0	7,440.0	-
Exchange rate	Birr per US\$	2.07	2.07	2.07	5.00	5.00
*estimated figure						

Source: Adapted from World of Information The Africa Review 1996 p 72

With a GDP per capita of US\$110, Ethiopia is one of the least developed countries. Coffee is the country's major export commodity accounting for over 50 per cent of total export. Dependence on coffee exports has impacted on its export earnings. One way of tackling this problem is through tourism development, which is the subject of this study.

2.2 HISTORICAL ROLE OF TOURISM IN AN ECONOMY

International tourism has grown at an unprecedented level and it is expected to be the leading economic sector by the year 2000. Tourism is one of the biggest employers in the world with jobs for an estimated one hundred million workers of which 44 million are seasonal [The Courier, 1990, 60-61]. As Table 1-1 in Chapter 1 above shows, between 1965 and 1993 there has been a considerable increase in tourist arrivals and receipts world wide. Arrivals increased on average 12 per cent annually and between 1965 and 1993 grew by 342 per cent. The 1993 receipt over that of 1965 changed massive 2693 per cent. International tourism's contribution to the economies of the developing countries is more significant than to industrialised countries. Lee (1988) observed that with formerly valuable exports, like sugar cane, suffering from the general fall in world commodity prices and competition from larger and more efficient agricultural producers, tourism in these circumstances is a mixed blessing. Table 2-2 shows international tourist arrivals and receipts between 1989 and 1993. While there was a 33.5 per cent increase in arrivals in 1993 over 1989 receipts showed an of 41.8 per cent over the same period.

Table 2-2
International Tourist Arrivals and Receipts (1989-1993)

Year	Arrivals	Receipts
	million	US\$ million
1989	429,025	215,569
1990	455,664	261,001
1991	463,209	267,491
1992	502,899	303,989
1993	512,939	305,816
% change 1993/1989	32.5	41.8

Source: Adapted from The Courier 1990; United Nations Statistical Yearbook 1994

Tourism development is justified in some countries for its ability to create employment as it is a labor-intensive industry. Edgell (1987:11-12) said that one of the reasons tourism is so important is that it is labor-intensive tending to help individuals who are hard-to-employ or lower-skilled. As D'Amore (1988:39, 40) put it, tourism is a human resource-intensive industry capable of generating foreign exchange earnings, and that there are roughly 40-50 million persons engaged in the tourism industry around the world. Wyer and Towner (1988:32) explained that over 60 million jobs worldwide are generated both directly and indirectly by foreign visitors and domestic travellers. The significance of tourism can best be shown in Table 2-3 in which between 1.6 per cent to 35.0 per cent of the labor force is absorbed in this sector in various countries. On average, 14.6 per cent of the total workforce in the countries listed is in tourism sector.

Table 2-3
Employment in Tourism in Some Countries of the World

Country	Data Date	Employment ('000)		
		Total	Tourism	% of tourism
Sub-Saharan Africa				
Botswana	1984	77.9	18.0	23.1
Cameroon	1981	381.4	47.2	12.4
Ethiopia*	1987	399.7*	5.3	1.3
Gambia	1984	30.8	3.2	10.4
Ghana	1979	481.9	31.6	6.5
Kenya	1983	1093.3	80.3	7.3
Malawi	1983	391.3	25.0	6.4
Mauritius	1984	200.4	8.9	4.4
Seychelles	1984	17.9	3.2	17.9
Swaziland	1983	78.6	7.7	9.8
Tanzania	1981	621.8	39.6	6.3
Zambia	1981	374.8	36.4	9.7
Zimbabwe	1983	1033.4	80.6	7.8
Average				9.5%
Latin America and Caribbean				
Bahamas	1979	72.7	22.0	30.3
Barbados	1984	93.1	19.9	21.4
Bermuda	1984	32.0	11.4	35.6
Bolivia	1982	1,707.9	128.8	7.5
Colombia	1980	3,202.2	760.9	23.8
Jamaica	1981	761.4	213.5	28.0
Peru	1981	5,387.0	1,076.4	20.0
Trinidad & Tobago	1983	399.4	91.2	22.8
Average				23.7%
Asia and Pacific				
Fiji	1984	78.6	14.9	18.9
Hong Kong	1984	2,193.0	573.8	26.1
India	1983	23,953.0	393.0	1.6
Indonesia	1978	51,780.0	7,709.0	14.9
Malaysia	1982	102.6	15.6	15.2
Singapore	1984	1,174.8	264.6	22.5
Sri Lanka	1983	761.6	88.4	11.6
Thailand	1982	24,831.3	2,378.2	9.6
Average				15.0%
Middle East and Mediterranean				
Egypt	1982	10,114.6	919.4	9.0
Israel	1984	1,359.0	169.9	12.5
Tunisia	1982	1,703.5	155.2	9.1
Average				10.2%

*Ethiopia's data was taken from the Ministry of Labor and Social Affairs and the National Bank of Ethiopia reports
Source: Computed from Wyer and Towner 1988:33 except Ethiopia

Thirty-three thousand jobs are created for every \$1 billion of spending in OECD countries while the same amount generates 50,000 jobs in the rest of the world [Mill, 1990:160]. Tourism as a labor-intensive industry is a growth area for employment generating opportunities for women and young people with an estimated 200,000 new jobs for Australians in the next decade [Carroll et al, 1990:18; Edwards and Murphy, 1992:33]. Grey, Edelmann and Dwyer (1991:19-20) as well as Hince (1991:20) estimated that 447,000 jobs had been generated by tourism in Australia in 1988/89 involving mainly the hospitality industry, transport and the retail shopping sector. As Table 2-4 shows, employment in tourism in 1989 accounted for 5.7 per cent of the total employment in Australia.

Table 2-4
Employment in Tourism Versus Other Sectors in Australia (1989)

Sector	Employees	% of total
Wholesale and retail trends	1,653,800	21.0
Community services	1,362,000	17.3
Manufacturing	1,234,800	15.7
Tourism	448,000	5.7
Agriculture, forestry, etc	430,000	5.5
Transport and storage	400,000	5.1
Public administration and defence	335,000	4.2
Others	2,007,100	25.5

Source: Data Computed from Grey et al 1991:20

The Ministry of Economic Development in Western Australia (1990:36) indicated that for each one million dollars spent by tourists in the State, twenty seven jobs are provided. Much of this employment creation is manifested in other service sector employment, particularly, retailing, and recreation, personal and other services. In general, Australian tourism contributes significantly to employment. On the other hand, McMillan (1982:33) stated that no single industry in Canada has greater potential for new job creation than does tourism.

Gamble (1989) as well as Sako (1990:69) indicated that, in Africa, not only is employment created directly in hotels and restaurants, but also indirectly in agriculture, manufacturing, and services supporting the tourist industry with the main areas of tourist activity - hotels, restaurants, and travel agencies - providing jobs for about 400,000 permanent staff. The role played by tourism varies from country to country. For example, for the Soviet economy, tourism is important mainly because it is a means of obtaining hard currency and a means of opening up to Western ideas [Vallen and Levinson, 1989:79]. Letcher and Snee (1989:216) indicated that in Austria, Japan, and Spain the contribution of international tourism to GDP amounted to 7.4 per cent, 5.1 per cent and 3.4 per cent, respectively.

Tourism contributed 5.4 per cent to the GDP in Australia in 1987/88 and 1988/89 [Grey et al, 1991:11]. As Coombes (1993:121) and The Canberra Times (1991:8) reported Australian tourism contributed about 7 percent to GDP and in Canberra alone it generated 450 million dollars annually. According to Moffet (1992:37), Australia's tourism arrivals grew by 8.4 per cent and receipts in real terms rose by 9.3 per cent in 1991. Hince (1991:20) reported that during 1988/89, domestic and overseas (inbound) tourism generated a gross expenditure of \$22.3 billion, contributing 5.4 per cent to gross domestic product. Morse (1989:225) indicated that tourism accounted for 6 per cent of Australia's GDP. Khan, Seng and Cheon (1990:410) indicated that Singapore's tourism revenue grew from about 5 per cent of the country's GDP in 1970 to more than 12 per cent of GDP in 1980. The economic significance of tourism to Singapore was such that from a mere \$280 million in 1970, tourism earnings have increased to an estimated \$4 billion in 1987 and tourism is the third most important sector, accounting for an average 15 percent of total exchange earnings over the last 5 years [Cheng and Khan, 1988].

Ahmed (1991b:75) indicated that Indian tourism industry generated an unprecedented \$1.5 billion in 1989, thereby making it the country's largest single

source of foreign-exchange earnings. The European Community's view of tourism is multifold: it represents about 5.5 per cent of Gross Domestic Product of the community and it provides, directly, the equivalent of 5.5 million full-time jobs [Europa, 1991:24]. Tourism plays a major role in some Sub-Saharan African countries. As Table 2-5 shows between 1989 and 1993, Zambia's tourism receipts grew 333.3 per cent while Uganda's receipts grew 233.3 per cent. For the same period Ethiopia's receipts showed a 4.8 per cent decline.

Table 2-5
Tourism Receipts in Some Sub-Saharan African Countries (1989-1993)
(US\$ million)

	1989	1990	1991	1992	1993	% change 1993/89
Botswana	54	65	79	65	74	37.0
Burundi	3	4	4	3	3	0.0
Comoros	3	2	9	8	8	166.7
Djibouti	5	6	6	10	13	160.0
Ethiopia	21	26	20	23	20	-4.8
Gambia	22	26	30	27	26	18.2
Kenya	420	466	432	442	413	-1.7
Lesotho	13	17	18	19	17	30.8
Madagascar	28	40	27	39	41	46.4
Mauritius	182	244	252	299	301	65.4
Nigeria	21	25	39	29	31	47.6
Rwanda	10	10	4	4	2	-80.0
Seychelles	91	120	99	117	116	27.5
South Africa	709	992	1131	1226	1190	67.8
Swaziland	25	25	26	32	30	20.0
Tanzania	60	65	95	120	147	145.0
Uganda	9	10	15	10	30	233.3
Zambia	12	41	35	51	52	333.3
Zimbabwe	55	64	75	105	103	87.3

Source: United Nations Statistical Yearbook 1994

As shown in Table 2-6 below tourism contributions to export earnings was very significant to the Seychelles (243.8 per cent), Kenya (32.4 per cent) and Tanzania (28.8 per cent). For Ethiopia's export tourism contributed only 13.6 per cent.

Table 2-6
Contribution of Tourism to Export Earnings of Some Sub-Saharan
African Countries (1992)
(US\$ million)

	Export	Tourism Receipts	Receipts/Exports
Ethiopia	163	23	13.6
Kenya	1,362	442	32.4
Madagascar	268	39	14.5
Mauritius	1,301	299	23.0
Nigeria	11,787	29	0.2
Rwanda	68	4	5.9
Seychelles	48	117	243.8
Tanzania	416	120	28.8
Uganda	143	10	7.0
Zambia	1,095	51	4.7
Zimbabwe	1,438	105	7.3

Source: United Nations 1993 Statistical Yearbook

Dieke (1991) as well as Mwere (1991) indicated that receipts from international tourists between 1963 and 1988 increased by 404.7 per cent and that a total of 106,500 persons were directly and indirectly employed in tourism in 1987 with an upward projection of 110,600 in 1997. During the late 1980's, tourism became Kenya's largest source of foreign exchange in terms of gross receipts. The Country's tourism indicators are shown in Table 2-7.

Table 2-7
International Tourism Indicators

	1991	1992	1993	% change 1993/91
Tourist arrivals ('000)	735	814	805	9.5
Tourist receipts (US\$ million)	424	440	450	6.1
Tourist exp (US\$ million) Expenditure/Receipts	24 5.7%	50 11.4%	70 15.5%	191.7

Sources: United Nations 1994 Year Book; Euromonitor The World Economic Fact Book 1994/5

As the above Table shows while tourist arrivals grew by 9.5 per cent between 1991 and 1993 receipts and expenditures grew 6.1 and 191.7 per cent, respectively, for the

period. As arrivals and receipts grew so did the rate of tourist expenditure suggesting that more and more tourist facilities were being added. A small scale case study of Kenya's tourism development is discussed below.

2.3 Tourism Development Policies in Kenya: a Case Study

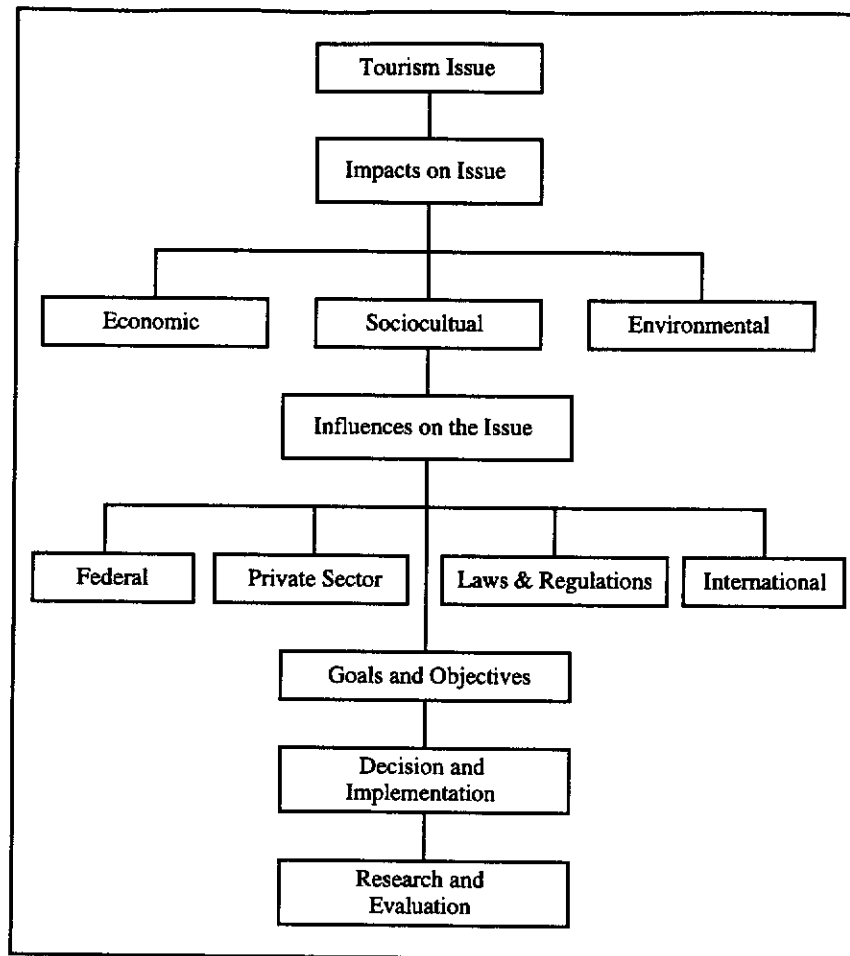
Brown and Essex (1989:533) defined a policy as "a course of action calculated to achieve specific objectives". Metelka's (1990:117) definition is: "... identification of overall or specific goals and strategies as stated by a governmental body ... to orient those involved in the planning process." Rowe and associates (1986:82) indicated that policies are used to make strategic alternatives work, i. e. policies are the specific courses of action and the guidelines for implementing a strategy. Metelka (1990:155) defined tourism policy as "plans, strategy, and action of a decision-making body calculated to achieve identified, specific objectives relevant to tourism." Wahab (1975:122) emphasized that in view of the importance of tourism from an economic, social, cultural and political aspect, it is necessary to bring tourism under state control and policy without hindering private initiatives.

Tourism is a wide ranging phenomenon and whilst certain operators such as hotels, companies involved in transportation and all other facets of tourism have specific objectives relating to their areas of interest, no one group has the overall interest of the total industry at heart. Brown and Essex (1989:533) state that policies are relevant to both the public and private tourism sectors. Policies in the public sector are more concerned with the benefits of tourism for the community and have to play a more strategic/coordinating/leadership role in the development of tourism. In the private sector, policies are designed to give corporate direction for a profit motive, and as such are opportunistic. Tourism policies have evolved from three distinct phases of development. The first phase, evident prior to the 1960s, took a laissez faire attitude towards tourism focusing on specific markets and sites with little regard to the wider implication of proposals or projects. This phase was referred to as 'hard'

tourism. During the second phase, from the 1960s onwards, the social implications of tourism were recognized, hence the name 'soft tourism'. Phase three is a blend of 'hard' and 'soft' tourism and in this phase the public sector actively encourages the private sector to invest in tourism. [Brown and Essex, 1989:533].

The World Tourism Organization (WTO) (1988:38) indicated that individual countries are required to design their tourism development policy by taking into account their historical, cultural, social and economic conditions. WTO (1988:38) reiterated that for Third World countries, the problems involved in the choice of a policy to optimize the return from their tourism resources, natural and cultural, are apt to raise complex issues. Overall resources are generally limited, and competing priorities between groups of users may interfere with a rational allocation process. Therefore, the primary function of governments has to be to create the right economic environment in which the private sector can fully participate and to remove unnecessary controls, restrictions or burdens. Edgell (1987:31) indicated that tourism policy issues reflect not only economic considerations but also socio-cultural and environmental concerns as well, as shown in Figure 2-1. These economic, socio-cultural and environmental concerns impact on the government structure, legal considerations as well as external relations.

Figure 2-1
Tourism Policy Issues



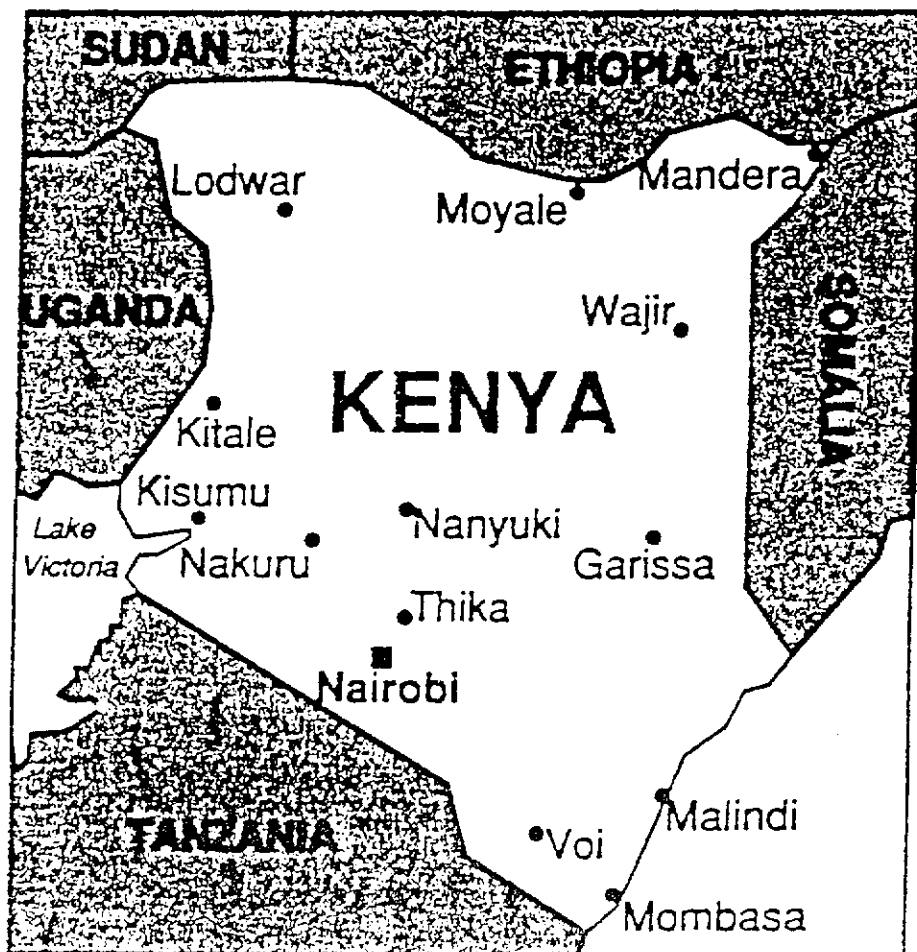
Tourism is an activity that is handled by a multiple of departments, businesses, private persons and as such calls for the need for integration, coordination, cooperation. A study of the United States tourism situation revealed that 89 programs in ten executive departments, and 47 programs in 36 independent agencies existed that could be considered as having some bearing on the development of travel, recreation and tourism [Inouye, 1975:3]. He suggested a coordinated national tourism policy with some degree of centralized national responsibility. A national policy is essential in that many of the strategies required stretch over a large number of public and private sector involvements. For example as Rodger (1975:13-16) indicated, a strategy to develop tourism should establish a basic framework of physical facilities: recreational land, resort complexes, resort communities, major

attractions, and tourist travelways as well as supportive programs such as environment, promotion, planning, training, and tourist information. Culpan (1987:541) indicated that the major strategies included a mass-marketing approach for the public through tourism intermediaries, and a focused strategy requiring careful analysis of the target market and its needs for unique services. Sinclair (1989:203) indicated that in general, developing countries are subject to widely differing economic, social and political circumstances and have different goals and priorities. Although no universal set of policy prescriptions is appropriate for all countries, the need to take account of different forms of intervention by foreign participants, during the process of policy formulation, is common to all tourist destinations. Dieke (1991) indicated that Kenya does not have a comprehensive, nation-wide tourism policy, and no clear policy guidelines for the tourism sector exist. Sinclair (1991:186) indicated that Kenya is an interesting case as it is one of the world's major long-haul tourist destinations, supplying safari, beach and city tourism.

According to Gamble (1989:35,37), although Kenya is renowned for safari tourism, it is beach tourism which has become more important in recent years. Not only has Kenya developed its safari and beach tourism, but also focused on developing Nairobi as a major international conference centre with the opening of The Kenyatta Conference Centre in 1973. The geographic distribution of Kenya's two main tourist attractions, wildlife safaris and beach holidays, reflects the nature of tourism development. For example, the development of the tourist industry is concentrated in three prime areas of the country: up-country game parks, Nairobi and its environs, and the coastal areas. Rajotte, (1991) indicated that today, Kenya's wildlife resources are distributed in over 40 locations and contribute enormously to foreign exchange earnings with 25 per cent of total foreign exchange coming from direct viewing and another 25 per cent from visitors on safaris. Tourism at the coast accounted for 46 per cent of all tourist bed-nights in Kenya in 1988 while Nairobi

attracts many visiting businessmen and with its good conference facilities, it hosts many international conferences that have become an established facet of Kenya's tourism [Dieke, 1991:276]. A major contributing factor to the industry's success has been the considerable growth in infrastructure and service facilities. A network of all-weather roads, two international airports serving 30 international airlines, and the Kilindini harbor in Mombasa, all combine to make travel to and from Kenya very easy (Map 2-1). [The Weekly Review, 1993:28].

Map 2-1
Map of Kenya



2.3.1 Policy Orientation

Safari tourism (following the 1948 promotion of the region by the East African Travel Association) was already in place in Kenya when it gained independence in 1963 from Britain. Mill and Morrison (1985:188) reiterated, "In Kenya wildlife safaris are rapidly increasing in popularity the camera being substituted in most cases for the gun. Gamble (1989) wrote that in 1965 the Kenyan Government set up the Kenyan Tourist Development Corporation (KTDC) to supervise the industry and direct public investment into accommodation and transport. Kenya has steadily increased the number of national parks and game reserves while its population has also grown rapidly, consequently the demand for land for towns and farming has risen and the cost of protecting the parks from poachers and squatters has grown accordingly. The policy is usually to evict squatters. [Gamble, 1989:35]. It should also be noted that the government of Kenya assigns part of the tourism revenue it accrues from the Amboseli and Mara National Parks to the chiefs in whose areas the parks were established. [Bell, 1990:15].

Gamble (1989:38) indicated that Kenya has harnessed its resources to attract a more influential type of tourist. This has been prompted, in part, by the relative decline of Nairobi as a tourist destination and the under-use of its high class accommodation. Employment in the sector generates 9.0 per cent of the total employment in Kenya with an estimated 106,500 persons directly and indirectly employed in tourism in 1987 with projections of 110,600 in 1988 [Dieke, 1991:271].

In 1990 arrivals grew by 10.7 per cent over the previous year. Receipts from tourists grew by 10.9 per cent. The country remained perhaps the most attractive destination in Africa hosting 5.1 per cent of Africa's and 30.5 per cent of Eastern Africa's tourist arrivals. Table 2-8 shows that between 1989 and 1993 on average Kenya's tourist arrivals grew by 1.9 per cent but receipts from tourists dropped by 0.1 per cent.

Over the period, tourism's contribution to export earnings grew by an annual average of 38.5 per cent.

Table 2-8
Kenya's Tourism Growth

Year	Arrivals (^{'000})	Receipts (US\$m)	Exports (US\$m)	Receipts/ Exports
1989	735	420	970	43.3
1990	814	466	1,031	45.2
1991	805	432	1,004	43.0
1992	782	442	1,350	32.7
1993	826	413	1,450	28.5

Sources: The United Nations Statistical Yearbook 1994 and Euromonitor The World Economic Factbook 1994/5

Summary (1990:14) indicated that a 70 per cent increase in tourist spending between 1971 and 1976 is believed to have increased agricultural output by 262 per cent and expanded the output of the food preparation industry by 720 per cent thus making Kenya perhaps the best example of the tourism multiplier effect among sub-Saharan countries. [Ankomah and Crompton, 1990:14]. Dieke (1991:271-2) attributed Kenya's tourism successes to the followings: (a) the decline of the South African market; (b) the innovations in major source markets by individual tour operators, and the relative loyalty of major European markets; (c) an increased accessibility linking Kenyan destinations to international tourist markets; (d) the promotional efforts of the Kenya Tourist Development Corporation (KTDC), the tourism investment arm of the government, and (e) collaboration with multinational corporations to link Kenya with the outside market. In addition, it should be stressed that Nairobi is serviced by most of the major European carriers. These successes, however, are not without problems. Upon independence, the Kenyan government was forced to address numerous problems attributed to neo-colonial economies. The government formulated several development strategies that outlined the future course of economic development. [Dieke,1991:273]. These priorities are: (a) to

accelerate growth in order to overcome stagnation characteristic of the years preceding 1963; (b) to indigenise the economy to give the native inhabitants greater control than hitherto over the national economy, and (c) government participation in, and diversification of, ownership of assets and of economic activities.

Thus, the policy of developing tourism is influenced by such thoughts that, although they may be declaratory, nonetheless provide the broad framework within which sectoral policies are formulated. [Dieke, 1991:274]. Within the tourism sector, the plan saw the need for government involvement, through the KTDC and relevant agencies, to provide dynamism for tourism development and growth, and to balance the efforts of the private and public sectors, along national development policy objectives.

2.3.2 Planning Responses

The Ministry of Tourism and Wildlife was created in 1966 as the main policy-making organ of the Kenyan government to allocate tourism resources to cover activities carried out by other public bodies whose responsibilities impinged on tourism. The Kenya Tourist Development Corporation was set up through an Act of Parliament in 1965, with the aim of closely monitoring the operation of the hotels, lodges, and other forms of accommodation. [Dieke, 1991:281]. As mentioned above, to promote tourism, the government has, over the years, created a number of bodies, such as the Kenya Tourism Development Corporation (KTDC), the Kenya Wildlife Services (KWS) and the Catering Levy Trustees Board. [The Weekly Review, 1993:28].

Kenya's tourism development objectives were to increase tourism's contribution to the growth of Gross Domestic Product; raise the foreign exchange earning capacity; create more employment opportunities; increase Kenyan ownership and management of the industry; reduce any undesirable social or environmental consequences; and

conserve, protect and improve environment and wildlife. The master plan focused on two programs. The first program involved developing tourist facilities along the coast by expanding the hotel capacity and by making optimum use of local resources. [Kenya, 1991]. The second program was associated with wildlife development by improving the facilities of three of Kenya's big reserves, Masai Mara, Amboseli and Samburu/Buffalo Springs. [Dieke,1991:281]. The hotel industry in Kenya includes both hotels with foreign and indigenous entrepreneurial capital invested in them and others in which the government has an equity interest. Other support services whose contribution is equally significant include tour operation, entertainment, restaurants, and recreation. [Dieke, 1991]. At the present time, foreign equity participation accounts for about 60 per cent of hotel beds in Kenya, while well over 50 per cent of Kenyan tourist hotel capacity is under foreign ownership, control, and management. Part of the reason for this significant level of foreign involvement in Kenya's hotel industry follows from the country's investment policy, which accords the private foreign investor a place in national economic development. [Dieke, 1991:285]. Boniface and Cooper (1987:133) wrote that Kenya encouraged foreign investment in the hotel industry, and is now looking for local ownership of the tourist industry. They said, "Kenya sees tourism as an important source of foreign currency and encourages private enterprise, including foreign investors."

2.3.3 Kenya's Tourist Markets

Although often thought of in Europe as a winter sun destination, Kenya is having increasing success in promoting itself as a year-round destination. [Economic Intelligence Unit, 1990:42]. The main origin country for visitors to Kenya was Germany, the vast majority of whom come to Kenya on holiday; other important European origins are Italy, Switzerland and Scandinavia. North American visitors are predominantly from the USA, although Canada increased its holiday visitor numbers by almost 60 percent in 1989 compared with the previous year. [Economic

Intelligence Unit, 1991:54]. Harrison (1992:7) indicated that 60 per cent of Kenyan visitors are from Europe, with another 12 per cent from North America. However, one of the country's major shortcomings has been its over-dependence on only a few markets, notably Europe and North America. The Weekly Review (1993:28) reported that the industry is now intensifying efforts to expand this base to tap the Far Eastern markets, whose immense potential, especially as a result of the fast economic growth being enjoyed by the South-East Asian nations, remains largely unexplored.

2.3.4 Perception of Kenya as a Tourist Destination: Lessons to be Learned

The perceptions held by potential visitors about an area may have significant influences upon the viability of that area as a tourist-recreation region. [Hunt, 1975:1]. For example, in Egypt Islamic fundamentalist attacks on tourists have cost the country \$700 million and losses will pass \$1 billion unless the violence was curbed [Euromoney, 1993:141]. More recent attacks on tourists in Kenya tarnished the country's image as a safe destination. The Weekly Review (1993:28) reiterated, that over the past two or so years, a series of attacks on tourists in several game reserves received so much international attention and bad publicity overseas that there was a slump of about 30 per cent in tourist bookings last year. The bad publicity, especially in Europe and North America, which depicted Kenya as an unsafe destination saw a dramatic drop in arrivals, hence the drop by one-third in 1991. Since 1990, Kenya's image started to decline due to riots in the city. Mwere (1991:39) wrote that closer at home, the riots in Kenyan towns in July prompted the UK and US governments to issue official warnings to their citizens to avoid Kenya because it might be 'unsafe for travellers'.

Of late, Kenya's major tourist generating countries painted a negative picture of the destination because of attacks on tourists on safari in the Masai Mara game park [Forrester, 1992:38]. Dine (1992:13) reported,

Noisy bad publicity surrounding the inept handling of the Julie Ward murder and subsequent trial filled newspaper columns in the UK, a prime market for Kenyan tourism, with images that are not likely to have spurred people off to the booking office. On top of that long-running saga came graphic reports of a few spectacular armed robberies in the game parks. Earlier this year, tribal violence flared up in western Kenya ... contributing more nasty headlines and transforming tourism operators' unease into outright worry.

There is already fear that Kenya will be facing over-capacity in the next few years due to the recession in prime tourism markets and inflation in Germany as a result of re-unification and the Bundesbank's replacement of the old Oldmark with Deutschmarks [Dine, 1992:13]. In addition, recent violent actions in some quarters would also contribute to a decline in arrivals. Dine (1992:13) showed the gloomy future for Kenya's tourism:

If the isolated events that have taken place in Kenya in recent months have had this staggering an effect on that country's tourism income, then it should be clear ... that a genuinely lucrative tourism income is out of the question in countries where rebels still roam large stretches of the terrain, where bad economic policies do not enable the economy to support the tourism sector by producing tourism consumables at home, or where any brush with officialdom, whether in the airport or at roadblocks, is overbearing enough that tour operators dare not let tourists face them without an escort.

The fear for decline in future arrivals not only emanate from attacks on tourists. The government is wrestling with game poachers as well. Harrison (1992:43) reported that the tourist is also a pawn in a political struggle in Kenya between the government and the poachers of wildlife. Ironically, it was big game hunting that once lured tourists to Kenya; now it may be illegal big game hunting that destroys it. There is a two-pronged problem for Kenya's national government: how to protect the game tourists come to see and how to protect the tourists. Economist Intelligence Unit (1991:65) reported

In the Masai Mara, nearly 200,000 annual visitors are beginning to create congestion problems in so far as the areas capacity to sustain visitors and their vehicles is concerned. In Amboseli National Park, the central park circuit has been over-used by tourist vehicles, mainly the ubiquitous tour operator's main buses. The park is suffering from desertification and the wildlife is reported to be at risk.

The fear of tourists and their search for safe destination is justifiable. Tourism performance in Kenya during 1992 was discouraging as the country was experiencing a "difficult year". [Forrester, 1993:47]. Moreover, Kenya's tourism development strategy is of late, being criticized. A television documentary on the Australian National Nine channel in 1992 indicated that various negative impacts of tourism are being felt in the country. These include (a) the largely Muslim population are lamenting to see tourists in bikinis, swimsuits, and in some instances near naked; (b) destruction of the environment - in camp sites tourists litter and the garbage is burned. Some animals like the elephants, monkeys and storks scavenge on the rubbish. It was reported that an elephant was poisoned by eating leftovers from cans; (c) it was further reported that with tourism came anti-social behaviour such as lack of moral standards, alcohol, drug, and sex tourism; (d) some tourists (particularly elderly ladies) get married to the young men of the country and as a result loss of cultural identity was observed; (e) at Mombasa beach damage to the corals is irreparable. In one year alone 120 tons of shells was destroyed by the tourists; (f) high concentration of tourists in small areas; (g) safari tour operators interfere with the wild animals by driving their vans into bushes away from the trails in search of wild animals; (h) eviction of the Masai Mara nomadic tribes from their traditional grazing land. These people having lost their pride and culture have now turned to become night entertainers to tourists in safari lodges thereby becoming "living museums", and (i) commercial agricultural development near the Amboseli national park is threatening the survival of wildlife. According to Teye (1987:13)

In 1971 Kenya closed its borders to "hippies" ... and forbade nude bathing on the Island of Lamu and other coastal districts as this was against the Kenyan way of life. The social problem becomes more serious in ... regions of a country ... where the Muslim religion, which forbids the consumption of alcohol and requires total coverage of the female body, predominates.

The Africa Review (1992:108) indicated that tourism's vulnerability is manifested in poor infrastructure, worries about health and safety. It wrote:

In 1989 the USA advised its nationals not to go to Kenya after two Americans were killed in an attack on a tourist bus. It repeated the advice after the July 1990 riots. Kenya's coast lost European customs from fears of cerebral malaria, AIDS and even cholera. In 1989 an Italian diplomat died from malaria, affecting the normally large numbers of Italian tourists on the coast. Infrastructure did not keep pace with new construction - hotels experienced water and electricity shortages..

Tourism is the number one foreign exchange earner for Kenya ahead of coffee and tea. It has been on the rise for over a decade but recent developments in the world and events at home have put doubts on the future success of this buoyant sector. [Dine, 1992:13; Harrison, 1992:13]. EIU (1989:81) reported that although tourism is clearly important to the Kenyan economy, both in direct effects upon employment, incomes and the balance of payments, and indirectly as a means of stimulating secondary demand in other sectors of the economy, Kenya illustrates some of the potentially negative effects of tourism on developing countries. The problems of tourism development in Kenya are identified as follows: (a) rapid growth and uncontrolled development; (b) impact of recession and oil crises; (c) seasonality; (d) political instability, and (e) complex land-use patterns. [Richards, 1991; Godfrey, 1986; Teye 1987, 1988; Ambrose,1980]. Kenya's policy objective in maximizing tourist arrivals, has brought with it considerable problems: (a) congestion at the game parks and reserves and the danger of the destruction of the ecosystem; (b) conflicts with competing demand from other sectors of the economy,

or with community interests in general; (c) a lack of promotion, training, and maintenance of facilities, and (d) the nature of the global economy and keen competition in the tourist market [Dieke, 1991:287, 288; Edgell, 1987b]. Economist Intelligence Unit (1989:82) wrote,

Kenya's social structure, culture, crafts and development strategies could all be negatively affected by international tourism. The possibility exists that wage rates could be distorted, that unbalanced consumption patterns could be encouraged by the presence of large numbers of prosperous foreign visitors, and that a second rate, "manufactured" African culture could be generated in order to entertain foreign tourists which could eclipse more deeply rooted cultures. These are all risks which Kenya has to balance in determining how best to develop its tourism sector.

Hudman and Hawkins (1989:54) said, "Kenya may be a good example of a destination that is at capacity level, and needs to weigh alternatives to decide its tourism future." Antonio Enriquez Savignac, Secretary-General of the World Tourism Organization (WTO) was quoted as saying the following in the 1993 International Tourism Exchange (ITB) in Berlin in March: Today's tourists have an increasingly clear idea of what they want. Quality, safety, respect for the environment, easy access and thoughtfully designed facilities are all on the agenda. And, as family budgets are constrained by the recession, today's tourists are demanding excellent value for money. [Forrester, 1993:47].

Policies are guidelines. They need to be evaluated at every stage and corrective measures should be taken if and when the laid policies go astray. Particularly, tourism policies must match with the changing needs of the tourists, the environment, the host community culture, etc. Changing the negative perception of the destination is another important task. A tarnished image may take sometime to improve but it rests with the concerned authorities to campaign for such a change. In this regard, the Kenyan tourism authorities have enough tasks on their hands.

Thurstone (1992:51) observed that perceptions can be altered dramatically in the short run, but over a longer period of time they return to that held before the exogenous shock. Lessons can be learned from Kenya's experience. Destinations like Ethiopia which are struggling to boost tourism must weigh policies carefully before implementation. A wrong policy will in the end lead to failure.

2.4 The Role of Tourism in Ethiopia

Although tourism development started in the mid 1960s, significant attention has not been paid to the sector. The slow growth rate that had been recorded before the 1974 revolution was stagnated at the onset of the 1974 revolution. The spread of socialist ideology instead of economic expediencies has played a significant role since 1974 and as a result tourism has declined considerably. Consequently, the attention paid by the government to the sector was minimal. This is shown in Table 2-9.

Table 2-9
Central Government Expenditure (Birr millions)

	84/85	85/86	86/87	87/88	88/89	89/90	% change 90/85
Total	3641	4065	3727	4291	5086	5191	42.6
General Services	1242	1257	1395	1730	2077	2415	94.4
% Gen Services/Total	34.1	36.1	37.4	40.5	40.8	46.5	
Social Services	616	659	592	814	773	709	15.1
% Social Services/Total	16.9	16.2	15.9	19.0	15.2	13.6	
Economic Services	992	1469	1206	1288	1510	1316	32.6
of which tourism, mining industry and commerce	355	448	393	478	675	553	55.8
% Economic Services/Total	27.2	36.1	32.3	30.0	29.7	25.3	
% Tourism.../Economic Services	35.8	30.5	32.6	37.1	44.7	42.0	
% Tourism.../Total	9.7	11.0	10.5	11.1	13.3	10.6	

Source: Data computed from National Bank of Ethiopia Annual Report 1988/89 p 74

From this Table, it is obvious that the government focused more on general services (central administration, foreign affairs, finance and planning) rather than on the

economic or social sectors. Between 1984/85 and 1989/90 general services expenditure grew by 94.4 per cent while social services and economic services grew by 15.1 per cent and 32.6 per cent respectively. The general services budgetary allocation was averaging out to 39.2 per cent, social services to 16.1 per cent, and economic services to 30.1 per cent. Tourism, mining, industry and commerce budgetary allocation for the six years averaged out to 37.1 per cent of economic services. On the other hand, only 11.0 per cent of the total budget was allocated to these four sectors. While tourism was not encouraged in the past, it remains to be seen whether the sector will play a vital role in the country's economy in future. The present government in its transitional economic policy stated the following:

Since tourism provides a vital support to the economy, it should be given special attention. Therefore, conditions will be created for its expansion and growth with private capital participation. Appropriate regulations and directives will be issued to this end. Private entrepreneurs will be encouraged to develop touristic services. State and private tour operators will function side by side. The state will handle the foreign exchange earned from tourism so as to ensure its proper utilisation. [The Transitional Government of Ethiopia, 1991:31]

2.4.1 Employment

The 1986/87 employment survey of the Ethiopian Ministry of Labor and Social Affairs indicated that 3.4 per cent of the total work force in the public sector was engaged in tourism activities. Table 2-10 shows the details.

Table 2-10
Employment in Selected Government Departments

	Number	% of Total
Ministry of Foreign Affairs	416	0.3
Ministry of Tea & Coffee Dev't	4,817	3.1
Ministry of Labor & Social Affairs	1,491	0.9
Hotels & Tourism Commission	5,265	3.4

Source: Ministry of Labor Social Affairs 1990:9

According to this survey, of those employed in the sector 97.3 per cent were permanent, 2.1 per cent were contractual and the remaining 0.6 per cent were casual workers. A sample of employment statistics shown below. According to the Ethiopian Tourism Commission statistics of 1990 6,477 persons were employed in this sector. 70.5 per cent of this figure is for employees under the age of 40. Table 2-11 shows the breakdown.

Table 2-11
Number of Employees in Tourism Sector (1989/90)

Age Group	Number	% of Total
Less than 24 years	373	5.7
24 - 29 years	1481	22.9
30 - 34 years	1460	22.5
35 - 39 years	1251	19.4
40 - 44 years	841	13.0
45 - 49 years	605	9.3
50 - 54 years	363	5.6
55 years and over	103	1.6
Total	6477	100.0

Source: Computed from ETC Tourism Statistics 1992:9

Although tourism's contribution to employment is not insignificant, it is however, far below the figure for The Gambia, for example, where some 7,000 people are working in hotels and tourist-related activities. [Cater, 1987, Binns,1991].

2.4.2 Contributions to the Economy

In 1993 tourism receipt was 0.4 per cent of GDP and 5.4% per cent of exports. The figures for 1991 were 0.3 per cent of GDP and 11.9 per cent of exports, respectively. Although the change is very small, tourism definitely contributes to both GDP and exports. Receipts from tourists dropped by 45.5 per cent between 1991 and 1993 and tourism expenditure for the period fell by 48.9 per cent while export earnings for the same period grew by 19.3 per cent (Table 2-12 shows the details).

Table 2-12
Contribution of Tourism to the National Economy

	1991	1992	1993	% Change 1993/91
GDP (US\$ million)	6,592.3	2,701.6	2,959.8	-55.1
Exports (US\$ million)	167.6	169.9	200.0	19.3
Tourism Receipts (US\$ million)	20.0	9.0	10.9	-45.5
Tourism expenditure (US\$ million)	9.0	3.9	4.6	-48.9
Tourism receipt/ GDP	0.3%	0.3%	0.4%	
Tourism/Exports	11.9%	5.3%	5.4%	

Sources: Data computed from 1. Central Statistical Authority 1990:199,238; 2. ONCCPSC 1989:59; 3. National Bank of Ethiopia 1988:36; 4. National Bank of Ethiopia 1989:54,635. The Economic Intelligence Unit; 6. Ethiopian Tourism Commission 1992:3; 7. The World Bank 1991:67; Euromonitor The World Economic Factbook 1994/5.

In spite of its contribution to the national economy, employment, and exports, tourism has never escaped criticism. According to O'Grady (1982), although tourism creates employment opportunities, these opportunities have their limitations. In developing countries the jobs created by tourism are unskilled, low-paid and servile while the skilled jobs often go to expatriates. Jobs are usually not available for the full year as tourism is a seasonal business. For example, in the Gambia only 24 per cent of those employed in tourism areas have their jobs for the full year; in Sri Lanka 20 per cent of total workers are employed seasonally. Tourism is a heavily-capital intensive operation. For example, in Sri Lanka the cost of creating a single job in the tourism sector averaged US\$5,050 while in large-scale heavy industry the cost of creating a single job was \$3,250. Destruction of the ecology due to over-use of tourist sites is being observed in many destinations. While cautioning that there may be negative impacts of tourism as [Papson 1979:251] pointed out, tourism can lead to a favorable balance of trade. Notwithstanding the negative effects that may be attributed to tourism, many of the countries cited have benefitted from the revenues generated by the industry. Countries like Ethiopia with enormous tourist attractions need to re-orient their development policies in order to benefit from the ever-growing international tourism.

2.5 Infrastructure

Infrastructure has been defined in various ways. A glimpse of the term might be an important opener for this chapter. Robinson (1976:147) said,

.. all those built-in services which are essential for modern social life and economic development; they include transport facilities such as roads, railways and airports, water supplies and sewerage systems, supplies of energy such as electricity and gas, communication facilities such as telephone services.

Coltman (1988:80) on the other hand indicated that infrastructure includes roads, airports, stations, utilities, communications, and similar items that make it easy for the tourist to reach and use a destination. Dickman's (1989:201) view of infrastructure is,

the development of supply systems such as utilities and services in an area, including water supplies, sewage disposal, gas and electric supplies ...; the general communications systems, including radio, telephone, television and satellite and transport and access, including highway systems, parking lots, street lighting, airports, marinas, docking facilities for all sizes and types of craft, bus and terminals, tracks, sidings, etc.

Bull (1991:203) summarized infrastructure as involving fixed passenger transportation investment, destination services such as power, water, sewerage, cleansing and health, fixed communication investment and so on. The World Book Dictionary (1992:1084) succinctly put it as, "the essential elements forming the basis of a system or structure". From this it follows that the major area of infrastructure focuses on transportation, communication and utilities. Because of the enormous cost of developing infrastructure and its use by the general public as a whole, the construction and maintenance of same remains the domain of the government - be it central, regional or local. [Robinson, 1976 and Gamble, 1989]. Many countries tend to develop tourism in areas where infrastructure is well-developed, like the capital of the country. This is generally a wrong solution as most tourist attractions are found

in the peripherals, and not in the urban areas. de Kadt (1979:34) warns of the dangers of such an approach:

The desirability of an existing infrastructure network will often argue in favor of placing new tourism developments near existing urban centres, rather than in remote area. But there are, of course, cases in which the location of the basic physical or cultural assets of the country indicates the desirability of "green-field" tourism development.

To this, adds Robinson (1976:147):

Since countries embarking upon tourism development programs cannot afford to do everything at once they must, of necessity, select certain areas for development; ... they will choose areas where an infrastructure already exists. Tourism potential, however, is often related to peripheral, remote and economically underdeveloped areas and the transformations of such areas into viable tourist propositions in the future calls for heavy initial investment in infrastructure.

Coltman (1988), de Kadt (1979), Mill and Morrison (1985) as well as Robinson (1976) reiterated that infrastructure must be provided by the government out of tax resources. The role of the government whether at central or at regional/local level is, essential. Although the focus of central government is towards general infrastructure, local and regional authorities can play a vital role in tourism infrastructure. Witt and Moutinho (1989:183) stressed,

The general infrastructure almost always comes under the responsibility of the public authorities for the necessary investment as well and their maintenance and management. Contrary to the general infrastructure, the tourism infrastructure depends ... on the regional and local authorities.

With the foregoing general view of infrastructure, this chapter attempts to examine infrastructure development in Ethiopia.

2.5.1 Infrastructure Development In Ethiopia

Ethiopia's urge for tourism development is great because of the industry's capabilities to generate foreign exchange, create employment opportunities, free the economy from an agrarian base, provide development opportunities to rural areas where tourist attractions are located, enhance cultural exchanges, etc. Other things being equal, without adequate and reliable infrastructure it would be a futile attempt to develop tourism. To this effect the rugged topography of the country has always been a great hindrance to develop a reliable transport - surface and water system. Ethiopia has some of the most breathtaking landscapes to be found in the world. The Ethiopian Airlines (1988:19) expressed that from the scorching yet colorful inferno of the Dallol Depression to the celestial heights of the Simien Mountains, popularized as the Roof of Africa, Ethiopia's terrain is characterized by bewildering variety and by an almost disheartening intractability.

Despite the inhospitable terrain, the country has managed to develop both surface and air transport networks although the growth of the latter is much faster than the former. Some of the Ethiopian Tourism Commission's studies viewed the country's infrastructure developments in varied ways. For example, Tourconsult (1990) focused on transport and communications while the International Bank for Reconstruction and Development (IBRD) (1970) covered areas such as roads, power supplies, water and sewerage facilities, and airports and predicted that tourism demand will form a growing proportion of the total usage and justification for several individual infrastructure facilities. Arthur D. Little (1969) emphasized the government's responsibility to provide the necessary infrastructure for the tourist industry, including roads and bridges, access roads to new projects, airstrips, electricity and water, telecommunications and telephone lines, hotel schools, and postal services. Ethiopia's transport network comprises surface, air and water although the latter is insignificant compared with the others.

2.5.1.1 Surface Transport

Moser (1990:106) stated, "the extent of a country's road network chiefly reflects the density of traffic". Moser (1990:106) further revealed that the country's road density is only 0.04 km/sq km - for a country with an area of over 1.2 million square kilometers, and this average is far below the African average density of 0.06 km/sq km. The Ethiopian Transport Construction Authority statistics indicated that there were 19,093 kilometers of roads in the country in 1990. The breakdown of the data showed that 21.6% was asphalted, 48.8% was gravel and 29.6% was rural. From the Central Statistical Authority report (1990) one can learn that the total length of roads increased 110.8% in 1987/88 over 1974/75. Table 2-13 shows the pattern of the road network between 1974/75 and 1987/88.

Table 2-13
Road Network (km)

Period	Aphalt	% Change	Gravel	% Change	Total	% Change
1974/75	3121	-	5677	-	8798	-
1979/80	3515	12.6	7638	34.5	11153	26.8
1984/85	3850	9.5	9654	26.4	13504	21.1
1987/88	4095	6.4	14454	49.7	18549	37.3

Source: Central Statistical Authority 1990:84-85

As mentioned earlier, the country's road network is definitely inadequate. Moreover, plans to construct more are not encouraging either. Table 2-14 shows that between 1989/90 and 1993/94 only 4,025 kms of roads have been planned for construction.

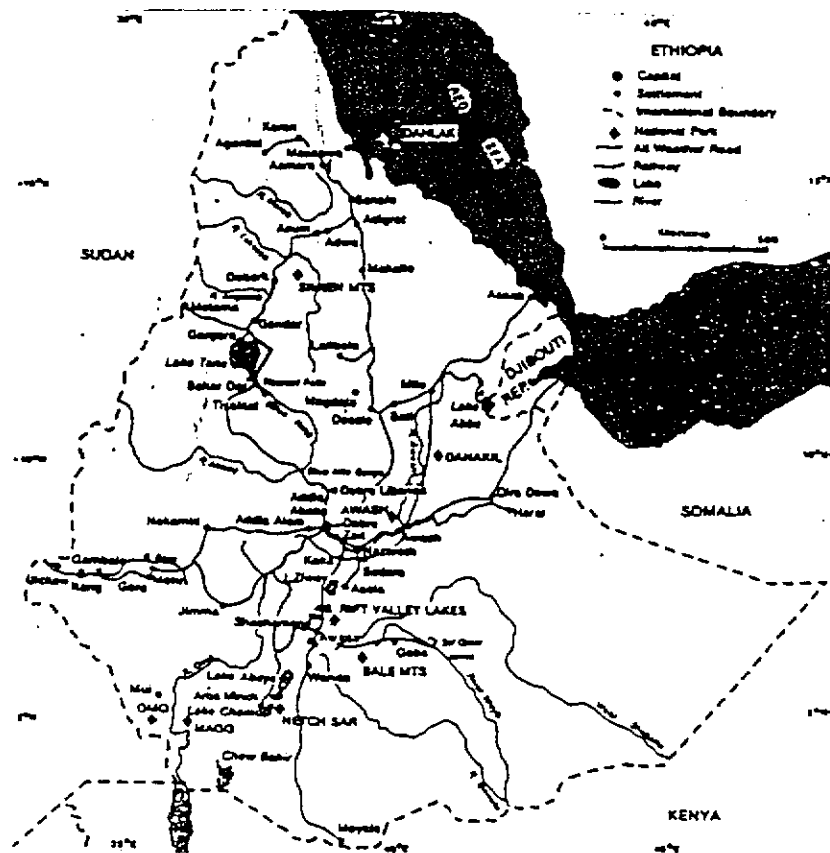
Table 2-14
Road Construction Five Year Plan (km)

Types of Roads	89/90	90/91	91/92	92/93	93/94
Asphalt overlays	45	55	55	50	60
Asphalt surfacing	100	100	100	100	90
Gravel main roads	90	155	185	175	145
Gravel rural roads	460	810	845	850	825
Total	695	1220	1185	1175	1125

Source: Ethiopian Transport Construction Authority Planning & Programming Division; various reports

As can be ascertained from the above Table, the government's effort to improve the basic infrastructure (roads network) is not very satisfactory. As mentioned elsewhere, a large portion of the national budget is spent on defence and often non-production sectors. The state of the roads has not passed without comments. Tourconsult (1990:118) had this to say, "the present situation of the roads, both from the network point of view and from the types of road and its state of maintenance does not allow easy surface connection between different points of tourist interest, even if located in adjacent areas".

Map 2-2
Road Map of Ethiopia



As can be seen from Map 2-2, the major roads radiating from Addis Ababa mostly followed historic routes to the north, the rift valley lakes to the south, the railway lines to the east and to the port in the north east, and to the west. However, their coverage is very low. The Ethiopian Mapping Authority (1988:35) relates the low level of road development to the corresponding level of vehicles. The Authority believes, "In general, the proportion of development of each mode of transportation is manifested by its accompanying traffic volume". To improve the road network the Ten Year Perspective Plan of the Provisional Military Government of Socialist Ethiopia (1984:340) allocated Birr 1,626.9 million for the period 1984/85 to 1993/94. Whether the allocated funds would have been available and properly utilized depends upon many factors, the foremost being areas of prioritization and allocation of scarce resources. However, it was indicated that Birr 422.20 million was spent on transport construction between 1984/85 and 1987/88. [Ministry of Finance Budgets Department]. Ethiopia's road network compared with that of three African countries which are also tourist destinations indicates how much Ethiopia has to pool her resources to have adequate roads. Table 2-15 shows the inadequacy of Ethiopia's road network.

Table 2-15
Road Network Comparison (1985-1988)

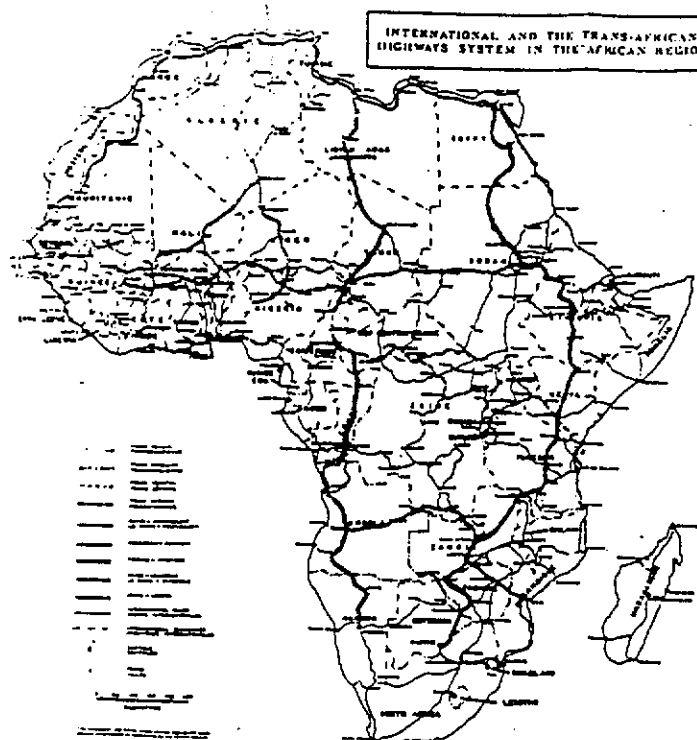
	Kenya	Tanzania	Zimbabwe	Ethiopia
Total road network	54584	81895	77927	39342
Motorways (km)	0	0	0	0
Main roads (km)	14288	17738	3557	18482
% of roads paved	12.3	3.9	17.0	20.0
Road density	0.10	0.09	0.20	0.04

Source : Moser (1990: 106-107) The Economist Yearbook of Vital World Statistics 1990

Generally speaking, the existing network of roads is not adequate for a country that looks for a tourist influx to generate badly needed foreign exchange. Major tourist attractions are not within easy reach of the main roads. Moreover, even the popular

tourist historic site of Lalibela, is not reachable by road and is closed to aircraft during the rainy season. One major potential exists, though, if Ethiopia and her neighbors cooperate. The Cairo - Gaborone Trans - African Highway runs through historic areas, the Blue Nile Gorge, Addis Ababa, the Rift Valley Lakes region and down through the most diverse cultures of Southern Ethiopia. Map 2-3 shows this highway. The cooperation of the countries through which this highway passes is paramount to use the network to make the flow of tourists through these countries. One area of co-operation of course is that each country involved needs to complete construction of the road network within its territory.

Map 2-3
The Trans-African Highway



Source: United Nations Economic Commission For Africa 1987

Ethiopia had a total of 58,600 vehicles of various types in 1984. Table 2-16 shows that the total number of vehicles grew by 2.2 per cent between 1984 and 1992. Commercial vehicles increased by 69.4 per cent during the period while passenger cars declined by 15.6 per cent during the same period.

Table 2-16
Vehicles Registered

Year	Passenger cars	Commercial vehicles	Total	Passenger Cars / Total
1984	47,500	11,100	58,600	81.0%
1985	41,100	18,200	59,300	69.3
1986	41,200	18,700	59,900	68.8
1987	48,300	10,900	59,200	81.6
1988	43,500	21,800	65,300	66.6
1989	42,800	21,600	64,400	66.4
1990	38,500	20,300	58,800	65.5
1991	40,200	20,200	60,400	66.5
1992	40,100	18,800	58,900	66.4
% change 1992/84	-15.6	69.4		

Source: United Nations Statistical Year Book 1994

2.5.1.2 Rail

Ethiopia has an inadequate railway system. The 781km railway line connects Addis Ababa and the Republic of Djibouti and it carries 8% of Ethiopia's export/import activity. It has been indicated that the significance of this railway line as being in an underdeveloped transport environment, the yearly turn-over of the Addis -Djibouti railway line is much larger. The Addis - Djibouti railway had sixty three passenger cars and covered 342 million passenger-kilometers in 1987/88. Tourconsult (1990) indicated that between 1984/85 and 1988/89 the number of passenger and quantity of freight moved had been declining due partially to operational and economic reasons. Table 2-17 shows the trend in the rail traffic between 1984 and 1993. Passengers travelled and freight moved fell by 14.2 per cent and 4.3 per cent, respectively, during the period.

Table 2-17
Rail Traffic

Year	Passenger - Kilo meter ('000)	Net Ton - Kilo meter ('000)
1984	268	117
1985	275	144
1986	276	166
1987	315	150
1988	342	141
1989	298	129
1990	277	126
1991	291	122
1992	204	84
1993	230	112
% change 1992/84	-14.2	- 4.3

Source: United Nations Statistical Year Book 1994

With old carriages and rails the railway only adds to the cost of operating it unless major upgrading takes place. Its vitality becomes more apparent as Eritrea has divorced itself from the rest of the country thereby diminishing Ethiopia's chance of using the traditional ports of Assab and Massawa free of charge.

2.5.1.3 Water Transport

Ethiopia had until May 1991 two important ports - Assab and Massawa - through which about ninety two per cent of the country's import/export activities are conducted. These ports are now in the hands of the Eritrean Peoples Liberation Front (EPLF) which took control of the northern-most province of Eritrea in May 1991 and has since declared independence in April 1993. Ethiopia's numerous rivers with the exception of the Baro in the South west, are not suitable for water transport because of rapids and falls.

2.5.1.4 Air Transport

The vitality of air transport to Ethiopia is stressed by the Ethiopian Mapping Authority (1988:34):

The development of air transport is vital to the country's socio-economic progress. In a country like Ethiopia, where the underdeveloped surface transport environment is accompanied by a large area and mountainous terrain, air transport with all its advantages keeps remote areas in touch, and facilitates international linkages.

To overcome this barrier, the national carrier, the Ethiopian Air Lines (EAL), was established in 1945 with assistance from Transcontinental and Western Airlines (TWA). Ethiopian Airlines thus made new air transport history for Ethiopia with their inauguration of a direct one day air service to Cairo on 8 April 1946. [EAL, 1988:45] Since then the country's link with international destinations has grown to thirty-nine international cities while at the same time serving over forty domestic cities and towns. The airline's international operations are shown in Table 2-18:

Table 2-18
Ethiopian Air Lines International Routes

	Countries	%	Cities	%
Africa	24	64.9	25	64.1
Europe	6	16.2	6	15.4
The Gulf	5	13.5	6	15.4
Far East	3	5.4	2	5.1
Total	37	100.0	39	100.0

Ethiopian Air Lines has formulated various strategic objectives, the most significant one as "assisting and participating in the development of tourism and tourism infrastructure". The benefits of air transport to tourism development are enumerated by the Civil Aviation Authority (CAA) (1990:6-7) in their Master Plan: (a) availing a wider opening of Ethiopia to international tourism, as well as providing a viable infrastructure for the categorical and progressive development of the tourist industry, as one of the main pillars of the National Economy; (b) rendering feasible the economic exploitation of the potential of Ethiopia's tourist resources, which are favored with a rich ancient heritage, abundant archaeological attractions, unique

opportunities for hunting or wildlife and game viewing, and above all, the all-the-year-round beautiful weather and fascinating nature; (c) bringing into the main stream of the National Economy substantial revenues in foreign currency, which directly contribute to effective improvement in the balance of trade; (d) providing good income for the direct recipients of the tourist trade, namely travel agents, hotels, restaurants, recreational facilities and places of attraction, retail industries and manufacturing of handicraft; (e) creating direct and indirect employment opportunities; (f) yielding a chain of benefits accruing from the multiplier effects and the related activities, and (g) encouraging tourist related investments and establishing backup linkage with other local industries.

Ethiopia has had three international airports - Addis Ababa, Asmara and Dire Dawa. However, after the May 1991 EPLF control of the province of Eritrea, Asmara has automatically ceased operation as an international airport for the rest of Ethiopia and since then it has become the international air port for the newly independent Eritrea. Even before that because of the military government's stringent tourist policy, Addis Ababa remained the only point of entry into the country. Overland transport across the country's borders was prohibited. Crowther (1989:290) said, "The only way into and out of Ethiopia is by air through Addis Ababa. Overland entry is not permitted". The Civil Aviation Authority (CAA) documents show that Ethiopia is a signatory to bilateral air service agreements with fifty seven countries 63% of which are in Africa. These signatories are listed in Table 2-19.

Table 2-19
Signatories of Bilateral Air Service Agreements

Region	Signatory Countries	Number	Percentage of Total
Africa	Algeria, Angola, Benin, Burking Faso, Burandi, Cameroon, Cape Verde, Central African Republic, Chad, Comoros, Congo, Cote D'Ivoire, Djibouti, Egypt, Ghana, Guinea, Kenya, Libreia, Libya, Malawi, Mali, Maurisius*, Mozambique*, Niger, Nigeria, Rwanda, Senegal, Seychelles, Somalia, Sudan, Swaziland, Tanzania, Togo, Uganda, Zaire, Zimbabwe	36	55.4%
Europe	Austria, Bulgaria, France, East Germany, West germany, Greece, Hungary, Italy, Poland, Romania, Spain*, United Kingdom, U.S.S.R.	13	20.0%
Middle East (Gulf Region)	Bahrain*, Emirates of Abu Dhabi*, Emirates of Dubai*, Lebanon, Pakistan, Saudia Arabia*, Yemen (North), Yemen (South)	8	12.3%
South & Far East Asia	Bangladesh, Burma, China, India, Korea (DPR), Sri Lanka, Thailand*	7	10.8%
Latin America	Cuba*	1	1.5%
	* = Temporary operating permit	65	100%

As a result of the above agreements, a number of international carriers have regular scheduled flights to and from Addis Ababa:

Air China	(Peoples Republic of China)
Air Djibouti	(Djibouti)
Alitalia	(Italy)
Alyemda	(North Yemen)
Kenya Airways	(Kenya)
Lufthansa	(West Germany)
Saudia	(Saudi Arabia)
Yemenia	(South Yemen)

Although the number of carriers serving the country seems low at this stage, there is a very great opportunity when conditions improve in the country. However, the bulk of passenger traffic has actually been carried by the Ethiopian Air Lines. This has been in line with the government's policy to protect the national carrier from losing its market share. This policy basically impacted negatively to the development of

tourism. The country's international passenger movement carried by the EAL shows that there was an annual average increase of 8.1% between 1977/78 and 1986/87. Domestic passenger movement on the other hand showed an annual average increase of 17.5% for the same period. Table 2-20 details passenger statistics for the period between 1978 and 1987.

Table 2-20
International and Domestic Passenger Growth

Year	International	% Growth	Domestic	% Growth
1978	129,996		48,976	
1979	155,447	19.6	44,325	-9.5
1980	156,153	19.8	56,393	27.2
1981	210,480	13.1	79,231	40.5
1982	219,933	4.5	108,517	37.0
1983	214,152	-2.6	133,075	22.6
1984	217,684	1.6	156,689	17.7
1985	239,906	10.2	188,910	20.6
1986	262,083	9.2	247,535	31.0
1987	276,914	5.7	273,862	10.6

Source: Ethiopian Air Lines Ten Year Plan 1986:16, 20

According to the Civil Aviation Authority Master Plan Table 2-21, it is envisaged that a minimum of two million passengers will have moved in and out of the country by the Year 2010.

Table 2-21
Passenger Traffic Forecast ('000s)

Year	High	% Change	M Likely	% Change	Low	% Change
1985*	761		761		761	
1995	1,192	56.6	1,144	50.3	1,081	42.0
2000	1,772	48.6	1,623	41.9	1,443	33.5
2005	2,482	40.1	2,169	33.6	1,841	27.6
2010	3,109	25.3	2,593	19.5	2,084	13.2
*Actual						

Source : Civil Aviation Authority Unpublished Reports

Ethiopian Air Lines on the other hand plans to carry about 1.2 million passengers by the end of its Ten Year plan period, i.e. 1997/98. According to Table 2-22, 695,222 international and 534,742 domestic passengers would be carried by the airlines by

the end of 1998. International passengers would increase by 121.7%, domestic passengers would increase by 98.2% and the total passengers would increase by 110.8% in 1998 over 1988.

Table 2-22
Ethiopian Air Lines Passenger Traffic Forecast

Year	Int'l	% Change	Domestic	% Change	Total	% Change
1988*	313,566		269,774		583,310	
1989*	339,967		323,222		663,189	
1990	380,586	11.9	354,248	9.6	734,834	10.8
1991	431,336	13.3	383,033	8.1	814,369	10.8
1992	483,929	12.2	408,535	6.7	892,464	9.6
1993	538,308	11.2	435,785	6.7	974,093	9.1
1994	579,334	7.6	453,879	4.2	1,033,213	6.1
1995	608,767	5.1	472,777	4.2	1,081,544	4.7
1996	634,257	4.2	492,529	4.2	1,126,786	4.2
1997	665,909	4.7	513,171	4.2	1,177,080	4.5
1998	695,222	4.7	534,742	4.2	1,229,964	4.5
% change 1998-1988	121.7%		98.2%		110.8%	

*Actual

Source: Compiled from EAL Ten Year Plan p 24

In 1993 435,000 international passengers were carried. This represents 57.8 per cent of total passengers carried while international kilo metres flown in relation to the total kilo metres flown during the year was 82.6 per cent. Table 2-23 shows the details.

Table 2-23
Passengers on Scheduled Services

	1980	1991	1992	1993	% change 1993/80
Total					
• Km flown (million)	10	21	26	23	130.0
• Passenger arrivals ('000)	243	636	756	752	249.5
• Passenger km	647	1568	1725	1717	165.4
• Total ton-km	85	224	264	259	204.7
International					
• Km flown (million)	10	18	22	19	90.0
• Passenger arrivals ('000)	186	352	447	435	133.9
• Passenger km	597	1431	1577	1571	163.1
• Total ton-km	78	209	248	244	212.8

Source: United Nations Statistical Year Book 1994

To meet its target the Air Lines will have in its stock a total of twenty six aircraft of various types by the end of 1997/98. As can be seen from Table 2-24, older aircraft have been scheduled to be phased out gradually. These include the 707-320c, 727-200 and 767-200 series. Accordingly, in 1998 the Airlines will have to operate with DC-3/c-47, 737s, 767s (A340), 757s, DHC-65 and ATR-42s.

Table 2-24
Ethiopian Air Lines Aircraft Fleet

Type	88	89	90	91	92	93	94	95	96	97	98
DC-3/C-47	8	5	5	5	5	5	5	5	5	5	5
707-320C	2	2	2	2	2	2	2	1	-	-	-
727-200	3	3	3	3	1	-	-	-	-	-	-
767-200	3	3	3	3	3	3	2	1	-	-	-
737-200	1	2	2	2	2	2	2	2	2	2	2
737-200P	-	-	-	-	2	3	4	4	4	4	4
767-400/MD11/ A340	-	-	-	-	-	-	2	3	4	4	4
757-200PF	-	-	1	2	2	2	2	3	3	3	3
DHC-6	5	5	5	5	5	5	5	5	5	5	5
ATR-42	2	2	2	2	2	2	3	3	3	3	3
TOTAL	25	22	23	24	24	24	27	27	26	26	26

Source: Ethiopian Air Lines Ten Year Plan p.69

It is anticipated that a total of 54,317 passenger aircraft movements will have taken place at Addis Ababa, Asmara and Dire Dawa International Airports by the year 2010. Table 2-25 shows that Addis Ababa will have to cater for a maximum of 48,578 aircraft movements, Asmara for 21,876 and Dire Dawa for 11,661 by 2010.

Table 2-25
Aircraft Movement Forecast

	1988*	1995	2000	2005	2010
Addis Ababa					
High	14,107	22,660	31,495	41,053	48,578
Most Likely	14,107	21,560	28,580	35,571	40,278
Low	14,107	20,560	25,830	30,632	32,876
Asmara**					
High	3,653	6,532	10,371	15,746	21,876
Most Likely	3,653	6,123	9,287	13,464	17,903
Low	3,653	5,580	7,921	10,954	13,886

**Table 2-25
Aircraft Movement Forecast (continued)**

	1988*	1995	2000	2005	2010
Dire Dawa	2,184	3,750	5,792	8,561	11,661
High	2,184	3,513	5,182	7,312	9,595
Most Likely	2,184	3,234	4,493	6,042	7,555
Low					
Total	19,944	32,942	47,658	65,360	82,115
High	19,944	31,156	43,049	56,347	67,776
Most Likely	19,944	29,374	38,244	47,628	54,317
Low					

* = actual

** = Since May 1991 the province of Eritrea of which Asmara is the capital, had been under the control of the Eritrean People's Liberation Front (EPLF) which subsequently declared independence for the province in 1993.

Source : Civil Aviation Authority Master Plan 1990:iii-v

The Civil Aviation Authority indicated that by the year 2010, a total of Birr 2,168,683,000 will be required for the investment needs of various airports in the country. A total of US Dollars 317,361,000 is required from foreign sources. According to Table 2-26, the three international airports that will benefit from the project are Addis Ababa, Asmara and Dire Dawa. However, the allocations for Asmara and Assab might be used for other purposes as the latter two have been under EPLF control since May 1991.

**Table 2-26
Civil Aviation Authority Investment Plan 1991-2010 (Birr Million)**

Airport	Phase I	Phase II	Total	% of Total
Addis Ababa	466.1	692.6	1,158.7	53.4
Asmara	258.4	106.4	364.8	16.8
Dire Dawa	43.3	29.5	72.8	3.4
Others:				
Assab & Gonder			67.4	3.1
5 hubs + 20 feeders			505.0	23.3
Total	767.8	828.5	2,168.7	100.0

Source: Compiled from CAA Master Plan

A comparative look into air transport statistics in the region (Table 2-26) indicates that Ethiopia is in a relatively better position.

Table 2-27
Air Transport (1986-1988)

	Passengers using largest airports ('000s)	Passenger KM	Aircraft departing ('000s)
Ethiopia	445	1,404	23
Kenya	1,348	1,322	11
Tanzania	513	238	12
Zimbabwe	747	674	10

Source : Moser 1990:119

As can be ascertained from Table 2-27 although Ethiopia seems to be heading in the right direction in the development of air transport, Eritrea's independence meant that Ethiopia lost enormous infrastructure invested there - particularly the international airport at Asmara, not to mention the ports of Assab and Massawa, among others.

2.5.2 Communications

Communications mainly constitute postal and telecommunications services available in the country although communication media such as radio, television, newspaper, etc can be included. Ethiopia's postal, telephone and telegraphic services go back to the beginning of the twentieth century when Emperor Menelik II introduced the services into the country. Prouty (1986:237) wrote that the laying of a telegraph line that was begun in 1897 and the completion of the telephonic communication between Harar and Addis Ababa by 1899 were ... a breakthrough for Emperor Menelik. Since that time both services have made great leaps forward in modernizing their operations.

2.5.2.1 Telecommunications Services

The Ethiopian Tourism Commission (1989:141) wrote that the Sululta satellite station, linked to the INTELSAT Atlantic Ocean satellite in 1974, has boosted Ethiopia's modern telecommunications capacity, with the result that direct links are now enjoyed with 20 countries. Since its establishment in 1953, the Ethiopian Telecommunication Authority has embarked upon bringing its services in line with modern communications technology. The Authority provides services to about 495 towns and cities domestically and caters for 105,850 telephone and 815 telex subscribers nation-wide. On the international level, the two satellite stations at Sululta provide at some percentage of capacity telephone, telex and television services with data transmission program to be introduced shortly. [Ethiopian Telecommunication Authority, 1988:20]. The Authority plans to increase the number of telephone subscribers to 374,000 by 1994. Telex subscription will be 1535, while automatic exchanges will grow 70% from 46 in 1988. Automatic exchange capacity will be 335,000 by 1994. Despite the growth of telecommunications services, the ratio of telephone lines available to the public is very low - for example, in 1985 there was only one telephone to every 345 persons.

2.5.2.2 Postal Services

The Ethiopian Postal Services Authority indicated that a total of 803 postal service stations were in the country in 1986/87. Table 2-28 shows the growth in postal service stations between 1978/79 and 1985/86. The 1986/87 statistics shows a 9.6% decrease. The change between 1978/79 and 1986/87 was 20.6%.

Table 2-28
Postal Services Stations

Year	Stations	% Change
1978/79	666	-
1979/80	707	6.2
1980/81	781	10.5
1981/82	790	1.2
1982/83	781	
1983/84	858	9.9
1984/85	871	1.1
1985/86	888	2.0
1986/87	803	(9.6)

Source : Postal Services Authority Postal Statistics 1988:3-4

Between 1984/85 and 1987/88, letters and parcels handled grew by an annual average rate of 1.4%. Table 2-29 shows that in 1987/88 33,037 thousand letters and 33,175 thousand parcels were handled. This was an increase of 5.8% and 5.7%, respectively.

Table 2-29
Letters and Parcels Handled ('000s)

	1984/85	1985/86	1986/87	1987/88
Letters				
Domestic	22131.5	23156.7	23253.0	23770.0
International*	9089.2	9232.4	10702.0	9267.0
TOTAL	31220.7	32389.1	33957.0	33037.0
Parcels				
Domestic	60.6	60.6	60.7	30.0
International*	91.0	90.5	89.7	108.0
TOTAL	1516	151.1	150.4	138.0
Grand Total	31372.3	32540.2	34107.4	33175.0

* = includes incoming and outgoing

Source : Central Statistical Authority 1990:192

2.5.2.3 Communications Media

It is important that the country's communication media, i.e. print and broadcast media, be mentioned at this stage. Ethiopia exercises strict control of these media

and as a result censorship is rampant. There have been no private newspapers, television stations or radio stations. The free access enjoyed to international journals before the revolution is now history. There used to be one private radio station, Radio Voice of the Gospel, which was nationalized immediately after the Revolution. Banks (1990:204) explained the situation, "Communication media are strictly controlled by the Government and present the official version of international and domestic events". In 1990 there were nine million radio receivers as opposed to only three million in 1984. The number of television receivers during the same period reached 200,000 from a low of 50,000 [Africa South of the Sahara 1990:467; The Europa Yearbook 1991:997, 1992:1039]. According to the Europa World Yearbook (1992:1038), there are three daily newspapers and fifteen periodicals in the country. It is important to mention that the Transitional Government of Ethiopia (TGE) in its bid to allow "freedom of expression" tolerated the mushrooming of private newspapers and journals since 1991. However, as the euphoria faded away, it introduced a press law which is intended to curtail free expression. The Ethiopian Review in its December 1992 editorial wrote that they were extremely concerned about the new "press law" which was recently approved by the Council of Representatives. We fear that under the new press law we will be unable to operate as freely and carry on the tasks of a free press. Because of strict government control the media lagged behind those of other African countries. Tables 2-30 shows the number of daily newspapers in circulation per 1,000 readers.

Table 2-30
Daily Newspapers in Some Sub-Saharan African Countries (1992)

Country	Number	Circulation ('000)	Per 1,000
Angola	4	116	12
Botswana	14	40	30
Cameroon	1	50	4
Ethiopia	4	70	1
Gambia	2	2	2
Kenya	5	354	14
Malawi	1	25	2
Mauritius	6	80	73
Namibia	4	209	136
Senegal	1	50	6
Swaziland	3	12	15
Zimbabwe	2	195	18

Source: United Nations Statistical Year Book 1994

Table 2-31 shows that in Ethiopia while three television sets and 187 radios are for every 1,000 persons, respectively, in Zambia, for example, 26 television sets and 52 radios are for every 1,000 persons.

Table 2-31
Television Sets and Radios in Some African Countries (1992)

Country	Radio ('000)	Per 1,000 persons	TV Sets ('000)	Per 1,000 persons
Botswana	160	122	22	17
Djibouti	41	54	25	88
Comoros	1,775	146	288	24
Sudan	6,670	250	2,060	77
Uganda	2,040	109	193	10
Zambia	705	82	225	26
Ethiopia	9,990	187	145	3

Source : United Nation Statistical Year Book 1994

2.5.3 Utilities

Utilities include electricity, water supply and sewerage systems. Each of these will be looked into briefly.

2.5.3.1 Electricity

Ethiopia is endowed with a huge potential of hydro electric and thermal power with an estimated 165 billion Kwh/a much of which can be developed at low cost. [Office of Investment and Joint Venture, 1991:13] The production and distribution of electricity is in the hands of the Government with the exception of the Sugar estates and Assab Oil Refinery which between themselves produce eight per cent of the total consumption. [PMGSE,1984:289] Ethiopia's energy production showed an annual average increase of 8.0% between 1978/79 and 1986/87. Table 2-32 shows that in 1986/87 1.07 billion kwh of electricity was produced in the country. This comprised 83.1% hydro electric power and 16.9% thermal power.

Table 2-32
Electricity Production ('000kwh)

Year	Hydro	Thermal	Total	% Change
1978/79	437985	105797	543782	-
1979/80	487553	127810	615363	13.2
1980/81	511536	137525	649061	5.5
1981/82	576283	155670	731953	12.8
1982/83	601925	154481	756406	3.3
1983/84	656912	166671	823583	8.9
1984/85	737133	169503	906636	10.1
1985/86	828267	170388	998655	10.1
1986/87	895457	181625	1077082	7.8

Source : Central Statistical Office 1990:162

Ethiopia has tremendous potential for the production of electricity, however, because the heavy investment costs it has not been developed to a sufficient degree. The 1990 Mixed Economic Policy clearly indicated that electricity production will remain in the hands of the Government. To this effect the Special Decree on Joint Ventures (1989:194) stated that joint ventures shall not, unless the Council of State decide otherwise, be permitted to invest in areas such as electric light and power, water supply, banking and insurance business, retail trade, transport and communications. The new Transitional Economic Policy issued by the Transitional

Government (1991:34-35) reiterated the previous government policy in that apart from air, sea and rail transport, telecommunications and postal services, and energy, other smaller activities such as engagement in road transport will be operated either by private and/or by the Government.

2.5.3.2 Water Supply

Seventy five per cent of the urban population gets low water supply and six per cent does not get water supply at all. As Table 2-33 shows only 18.9% of the urban population gets an adequate supply of water. The majority (75.1%) get inadequate water supply while 6.0% do not get any. This percentage is reduced to 14% if Addis Ababa and Asmara are excluded from the statistics.

Table 2-33
Urban Water Supply (1983/84)

	Adequate	Inadequate	No Supply
No. of cities/towns	20	107	30
% of cities/towns	12.7	68.2	19.1
Population ('000s)	906.9	3613.1	290.6
% of population	18.9	75.1	6.0

Source : PMGSE 1984:315

The traditional focus on deep well water supply has recently been changed and focus is being made to supply the rural population with a combination of deep well, stream, and dam water. Only 5.5% of the total rural population of 29.05 million was able to get water supply in 1983/84. This was due to (a) lack of a comprehensive national policy on water supply; (b) shortage of trained/skilled manpower; (c) scarcity of imported equipment due to the shortage of foreign exchange; (d) lack of water supply tariff, and (e) institutional deficiency. To overcome this problem the Government included a water development plan in its Ten Year Perspective Plan. This is shown in Table 2-34.

Table 2-34
Water Supply Plan

Types of Services	1983/84	1984/85*	1993/94**
Rural drinking water ('000s)	1,613	2,118	13,100
Urban water and sewerage ('000s)	3,400	3,600	936
Water technology institute (students)	-	-	4,825
Addis Ababa water and sewerage (m ³ water)	68,000	70,000	110,000

* = estimate

** = plan

Source : PMGSE 1984:320

2.5.3.4 Sewage

Addis Ababa is the only city with a modern sewerage disposal system, with fifteen sewage disposal trucks.

2.5.4 Health Services

Modern medical practice was introduced into Ethiopia in the 16th century and the first health centre was begun in 1908 by Emperor Menelik II who also established the first hospital in the country. Despite its early start the country's health infrastructure has suffered from several drawbacks. As Table 2-35 shows, the percentage growth of health services has been very slow. Between 1973/74 and 1986/87 hospitals grew by only 2.4%; hospital beds by 36.0%; clinics by 234.5% and health centres by 69.9%.

Table 2-35
Medical And Health Facilities

	1973/74	1975/76	1981/82	1986/87
Hospitals	84	84	86	86
Beds	8,624	8,623	10,993	11,745
Clinics	650	1009	1761	2174
Health Centres	93	106	131	158

Source : Central Statistical Authority 1990:154

The number of health personnel between 1981/82 and 1988 is shown in Table 2-36.

Table 2-36
Medical Personnel (Excluding Police and Armed Forces)

	1981/82	1986/87	1988	% change 1988/82
Doctors	504	1,241	1,466	190.9
Nurses	1,680	2,982	3,494	108.0
Pharmacists and attendants	93	282	364	291.4

Source: CSA Facts and Figures 1990:161; World Health Organization World Health Statistics Annual 1993

In general the existing health infrastructure is very low. One obstacle for its growth is the monopolization of the health sector by the government. Private investors in hospitals and health centers before the Revolution were confiscated and were evicted from the country. Many missionary hospitals in many parts of the country were victims of the government's policy. This incident detracted many would-be investors in this sector. It is important that health services facilities are available in any tourist destination. Tourists regard the availability of such facilities as one of the most important parameters while deciding to travel to a particular tourist destination.

2.6 Conclusion

Travel and tourism are perhaps the world's largest industries, with some \$2 trillion in annual travel-related sales around the world. The travel industry plays a major role

in the spheres of business, recreation, and family life [Tarlow and Muehsam 1992:28]. McIntosh and Goeldner (1990:487) put the significance of tourism in the following manner:

The tourism industry has achieved its goal of becoming the world's first "peace Industry"; an industry which recognizes, promotes and supports the belief that every traveller is potentially as "Ambassador for Peace", an industry which will be a model for other industries to follow.

The future role of tourism is best summarised by Tarlow and Muehsam (1992:32):

...the latter part of the twentieth century has seen a dramatic change in travel and tourism. Travel is no longer a torturous necessity, but an increasingly pleasurable option. With its emphasis on resource preservation, individual autonomy, comfort, convenience, affordability, and personalisation, post industrial travel will offer a broader horizon of options and opportunities.

The need for improving the country's infrastructure is overdue. Improvements can only be viable when there is peace in the country, when the country is led by a popularly elected stable government, and when external investors are willing to come and invest in the country without fear of confiscation and the like. Unless the present political turmoil settles down and unless the image of the country is portrayed positively through sustained promotional campaign, the recent economic policy will only remain in the bottom drawers, hence making further development of the country's infrastructure wishful thinking.

CHAPTER 3

TOURIST FACILITIES

3.1 Introduction

As discussed in Chapter 2 tourism development requires not only infrastructure development but also calls for diverse elements of physical facilities and attractions such as accommodation, travel agency, national parks, museums, shopping centres, financial services, etc. [Inskeep, 1991]. The development of these facilities calls for the attention of the government in various ways to encourage the efficient operation of the industry: (a) direct financial assistance by way of grants etc., (b) indirect assistance through expenditure on tourism related infrastructure, and (c) regulatory reforms [Fergusson, 1987:24]. For instance in Tanzania road construction within national parks falls under the jurisdiction of the Wildlife Conservation Authorities. [Curry, 1990] Moreover, other tourist facilities such as national museums, can also require active involvement of the government body [Zeppel and Hall, 1978:32]

3.2 Accommodation

The Indian Government, for instance, in order to alleviate the shortage of hotel rooms, removed hotel construction activities from the purview of the Monopolies and Restrictive Trade Practices Act and reduced import duties from 200 percent to 45 per cent on critical items used in hotel construction [Ahmed, 1991:76-77]. The development of hotels must be tailored to the demands for them. Over-supply or the supply of wrong types of hotels would simply add to the cost of operations. In China, decentralisation in the decision making process resulted in building hotels that have no demand either by international tourists or by domestic tourists. This was evidenced by a market study in 1985 of foreign tourists which revealed that 35 per cent wanting economy-class hotels, 60 per cent middle-class and only 5 per cent wanting de-luxe facilities [Tisdell and Wen, 1991:62]. Tisdell and Wen attributed this imbalance of supply and demand for hotels to lack of coordination between the

various parties including the central government; local government (provincial and city); government departments, eg NTA, army; collectives (in the cities and rural areas); in a few instances, and individuals.

Most foreign visitors use hotel accommodation. For example, in Singapore, between 1980 and 1986 over 70 per cent used hotel accommodation making the occupancy rates for hotel rooms as high as 80 per cent. [Hornby and Fyre,1990:62] On the other hand, Dieke (1991:285) explained that foreign equity participation accounts for about 60 per cent of hotel beds in Kenya, while well over 50 per cent of Kenya's hotel capacity is under foreign ownership, control, and management. Part of the reason for this significant level of foreign involvement in Kenya's hotel industry is the country's investment policy, which accords the private foreign investor a place in national economic development, the most common form of involvement in the hotel industry being management contracts. [Dieke, 1991:285, Wyer and Towner, 1988:9] As Table 3-1 indicates, proper policy directions can contribute to the availability of sufficient accommodation in the country. Kenya, for example, has the highest number of beds, while Ethiopia only surpasses The Gambia. A small inland destination, Mauritius has more beds than Ethiopia.

Table 3-1
Accommodation (Beds) in Some African Countries 1989

Ethiopia	5,482
The Gambia	5,000
Kenya	28,405
Mauritius	7,374
Senegal	11,734

Source: EIU International Tourism Reports Various

As shown in Table 3-2 the World Tourism Organization report indicates that between 1985 and 1994 world capacity hotels and similar establishments grew by 32.8 per cent. Africa's share grew by 43.8 per cent during the period.

Table 3-2
World Capacity Hotels and Similar Establishments
Preliminary results

	Thousands of rooms			Additional rooms ('000s)	% share	% share	
	1985	1990	1994	1985-1994	1985-1994	1985	1994
World	9,199	11,060	12,218	3,019	32.8	100.0	100.0
Africa	267	334	384	117	43.8	2.9	3.1
Americas	3,462	4,311	4,493	1,031	29.8	37.6	36.8
East Asia/Pacific	813	1,207	1,557	744	91.5	8.8	12.7
Europe	4,425	4,936	5,462	1,037	23.4	48.1	44.7
Middle East	130	160	179	49	37.7	1.4	1.5
South Asia	102	112	143	41	40.2	1.1	1.2

Source: World Tourism Organization (1996)

The hotel capacity available for tourists is a significant indication of the volume of tourism that could be anticipated [IBRD, 1970; Tourconsult, 1990:47]. Table 3-3 shows stock of hotel capacity between 1990 and 1991 in Ethiopia.

Table 3-3
Hotel Rooms and Beds*

Zones	Hotels			Rooms			Beds		
	1990	1991	% chg	1990	1991	% chg	1990	1991	% chg
Addis Ababa**	15	15	-	1513	1513	0.2	2596	2607	0.4
Central	10	10	-	456	456	1.3	911	895	-1.7
Northern***	10	2	-80.0	368	368	-85.6	673	87	-87.1
N Western	7	7	-	229	229	-1.3	439	431	-1.8
N Eastern	5	5	-	174	174	-0.6	286	285	-0.3
Eastern	3	3	-	132	132	3.0	226	229	1.3
Southern	3	3	-	108	108	-	184	188	2.2
S Western	4	4	-	109	109	-	211	209	-0.9
Total	57	49	-14.0	3089	2783	-9.9	5526	4931	-10.8

* = government hotels only; ** = includes Addis Ababa Hilton International; *** = hotels in Tigray only.

Source: Computed from ETC Tourism Statistics (Summary) 1992:27

As Table 3-3 shows in 1991 there were 49 government hotels with 2,783 rooms and 4,931 beds. This is below the 1990 figure which had 57 hotels (3,089 rooms, 5,526 beds). Currently there are seven government hotels chains with 2,783 rooms (4,931 beds) in the country catering for the tourism industry [Table 3-4].

**Table 3-4
Hotel Chains**

Hotel Chains	Zones	No of Hotels
Ras Hotels	Eastern	13
Ethiopia Hotels	Western	10
Ghion Hotels	Northern	14
Wabe Shebelle Hotels	Southern	6
Ambassoira Hotels	Eritrea & Tigray	10
Filwoha Hotels	Addis Ababa	3
Addis Ababa Hilton Int'l	Addis Ababa	1

Source: Computed from ETC Tourism Statistics (Summary) (1992)

These are entirely government-owned and operated in line with the tourism policy that prohibits use of private hotels by tourists. Vandyk (1992:110) wrote, "much has to be done to rebuild and refurbish hotels. Even in the capital, Addis Ababa, only one truly first-class hotel exists". Between 1985 and 1989 there was a 1.8 per cent decline in the number of hotels and an 11 per cent increase in the number of hotel beds. 47.4 per cent of the beds are located in the Addis Ababa Planning Zone while the balance is spread across the country [Ethiopian Tourism Commission 1991]. A new 500-room hotel earlier planned to be constructed in Addis Ababa and to be operated by one of the most important international hotel chains has not materialised. Only the Addis Ababa Hilton International is managed by the Hilton International chain under a management contract from the government. The number of guests staying in hotels per night showed an erratic change between 1987 and 1991 as shown in Table 3-5.

**Table 3-5
International Tourists by Length of Stay in Hotels**

Length of Stay (Days)	Guests Per Night					% Change 91/87
	1987	1988	1989	1990	1991	
1 - 5	20,484	36,811	46,384	44,040	24,181	18.0
6 - 10	5,988	16,867	9,104	7,027	4,416	-26.2
11 - 15	2,768	4,060	3,773	3,048	2,049	-26.0
16 - 20	2,419	4,095	3,274	2,477	2,169	-10.3
21 - 30	5,109	7,453	7,151	4,311	3,951	-22.7
Total Yearly % Changes	36,748 -	69,286 88.5	69,686 0.6	60,903 -12.6	37,126 -39.0	1.0 -

Source: Computed from ETC Tourism Statistics (Summary) 1992:28

As the foregoing table indicates, there has been a sharp decline in the number of tourists staying in hotels for more than five nights. On the average the fall is 21.3 per cent. On the other hand, changes per year are also significant. Only 1988 showed a great jump over the previous year. Table 3-6 shows the number of tourists staying in hotels by purpose of visits.

Table 3-6
International Tourist Nights in Hotels by Purpose of Visit

Purpose	1987*	1988	1989	1990	1991	91/87
Business	37,495	69,185	69,686	60,903	37,126	-1.0
Vacation	12,636	21,159	17,572	11,415	4,771	-62.22
VFR	282	579	236	231	275	-2.5
Transit	6,452	15,090	23,743	25,814	15,961	147.4
Conference	2,556	2,198	2,971	1,631	1,958	-23.4
Others	1,746	3,142	2,884	2,531	3,597	106.0
Total Yearly	37,495	69,185	69,686	60,903	37,126	-1.0
% Change	-	84.5	0.7	-12.6	-39.0	-

* includes Ethiopia, Filwoha and Ras Hotels only

Source: Computed from ETC Tourism Statistics (Summary) 1992:29

As Vandyk (1992:110) indicated a large number of Ethiopian Airlines' international passengers are in transit at Bole International Airport (Addis Ababa), hence the above table shows that transiting tourists grew considerably during the period while the percentage of vacationers dropped by 62.2 per cent. The decline in vacation tourists could be attributed to the unsafe situation within the country. The 57 (reduced to 49 in 1992) hotels under the National Hotels Corporation employ more than 5,000 workers. The 1989/90 figure in Table 3-7 showed 6,477 employees classified under various age groups. While 45.4 per cent of employers are between the ages of 24 and 34, 70.5 per cent of all employees are 39 years or less.

Table 3-7
Employees in the Tourism Sector (Government Only)

Age Group	Number	% of Total	Cummulative %
< 24 years	373	5.8	5.8
24 - 29 years	1,481	22.9	28.7
30 - 34 years	1,460	22.5	51.2
35 - 39 years	1,251	19.3	70.5
40 - 44 years	841	13.0	83.5
45 - 49 years	605	9.3	92.8
50 - 54 years	363	5.6	98.4
> 55 years	48	0.7	99.1
Unspecified	55	0.9	100.0
Total	6,477	100.0	

Source: Computed from ETC Tourism Statistics (Summary) 1992:9

The national hotels were able to generate 19.3 million Birr in foreign exchange in 1991. [Table 3-8]. This was 93 percent over what was generated in 1987 and constituted 49.8 per cent of total foreign exchange revenue generated in 1991 from tourists excluding international airfare and bank exchanges.

Table 3-8
Foreign Exchange Revenue from International Tourists (Birr million)

Revenue from	1987	1988	1989	1990	1991	% 91/87
Hotel services	10.0	18.4	17.8	20.7	19.3	93.0
Tour operation	3.0	3.6	3.5	3.0	1.7	-43.3
Duty free gift	16.5	17.2	21.6	28.5	17.8	7.9
Total	29.5	39.2	42.9	52.2	38.8	31.5
Yearly % Change	-	32.9	9.4	21.7	-25.6	-

Source: Computed from ETC Tourism Statistics (Summary) 1992:11

While the centralisation of hotels by the government may have improved the image of the industry in some ways, it has created problems for unit managers by removing them from many spheres of decision making [UNDP, 1989:4]. According to the UNDP report, over-staffing appears to be a critical problem in many areas mainly due to the government's employment policy as well as being due to unit managers' lack of skills to predict their own needs accurately. The changing economic and

political conditions of the world as well as the inadequacy of government hotels prompted the government to decree a hotel services development program in 1989 whereby both domestic and international developers were allowed to develop hotels. The Decree stated that (a) it is necessary to provide for the development of hotels with a view to adequately serving domestic and international tourists and others, broadening and expanding hotel services and spreading it throughout the country; (b) it is believed that cooperatives, mass organisations, business organisations and individual entrepreneurs can play an important role in the development of hotel services; (c) it is necessary to create appropriate conditions for the expansion of hotel services and encourage non-governmental participation with a view to making the country's economy benefit from this sector [Council of State, 1989:189]. The National Hotels Corporation (NHC) has been operating at a loss. For example, as can be ascertained from Table 3-9, in 1990 twenty nine hotels (52 per cent of the total) reported losses. This might be attributed to security problems in the north, to a high manpower/room ratio as well as low productivity per employee.

Table 3-9
Hotel Chains which Recorded Losses in 1990

Chain	Operating Region	No. of Hotels	No. of Losing
Ambassoira	Northern	10	10
Ghion	North Western	7	12*
Ras	Eastern	3	4*
W Shebelle	Southern	3	2
Filwoha	Addis Ababa	3	1
*includes restaurants			

Ambassoira in the north and Ghion in the north west operate in areas where security has been at its worst. It is therefore not surprising to see these chains report losses. The disturbing figures are Ras, Wabe Shebelle and Filwoha operate in areas of relative safety. On the other hand, a single hotel Hilton International, showed a significant amount of revenue per employee. This is shown in Table 3-10. Hilton

International is a government hotel whose management is contracted out to Hilton International.

Table 3-10
Hotel Chains Revenue/Employee Ratio (1990)

Hotel Chain	Birr/Employee
Hilton International	39,618*
Wabe Shebelle	14,996
Ethiopia	13,984
Ghion	12,762
Ras	12,576
Ambassoira	12,462
Filwoha	12,386
*single hotel with no chain	

To improve the efficiency of services to customers between 1971 and 1988 the National Hotels Corporation provided training to over 680 workers, eleven of whom were given training abroad [WTO, 1988:154]. This training scheme was incorporated in the overall training programs of the Ethiopian Tourism Commission. Investments in hotel development focused on renovating or expanding existing hotels. New hotel developments envisaged earlier have not materialised. A total of Birr 403.3 million was earmarked for the purpose for ten years 1989/90 and 1997/98. According to the plan, 550-room hotels will be built throughout the country (300 rooms in Addis Ababa) [ONCCPSC 1990:117-118]. Focus was being and will continue to be made on extension/renovation projects as opposed to building new hotels. After the introduction of the 1990 mixed economic policy, a total of twenty eight local private investors in hotel development have obtained licenses from the Ethiopian Tourism Commission to build hotels with up to 50 rooms. These hotels, when completed will cater for domestic tourists. Their total construction cost was estimated to be around Birr 36.5 Million and will have 709 bed rooms, and they will provide jobs for 707 workers. Apart from these new projects, one private hotel chain has been allowed by the Government to continue operation while other such hotels

were nationalized. The hotel chain caters for domestic tourists. According to the deputy manager of this chain, there are eleven hotels with 426 rooms employing over 400 workers. It was also revealed that four hotels, costing 52 million Birr, were planned to be constructed in various parts of the country. These new hotels would have 380 rooms and would employ 590 workers when completed. According to the Ethiopian Tourism Commission (1995) records there has been a significant increase in the number of hotels of various categories built recently. Table 3-11 shows the distribution of hotels in various regions. Addis Ababa accounts for 52.4 per cent of the number of hotels in the country, followed by the northern region including Tigray, Gonder, Gojjam and Wollo. Eastern region including Harerghie and Bale accounted for only 4.8 per cent of the total.

Table 3-11
Distribution of Hotels

Region	Number of hotels	% of total
Total	105	100.0
Addis Ababa	55	52.4
Central	9	8.6
East	5	4.8
North	19	18.1
South	10	9.5
West	7	6.6

Source: Ethiopian Tourism Commission (1995)

3.3 Tourist Attractions in Ethiopia

Arthur D. Little (1969) observed that with its impressive scenery Ethiopia was in a position to provide one of Africa's most beautiful frameworks for the observation of wild animals. The country has a range of animal species, several which are found nowhere else in the world and are therefore major attractions for nature lovers. Ethiopia also has an impressive range of bird life -280 species in all - of which 26 are found only in Ethiopia. The country's best and principal tourist attractions - the ones on the Historic Route - are located on a line covered by the international round-trip air ticket from Europe or America to Addis Ababa and south. Thus visits to

these attractions can easily be included in a trip to Addis Ababa, Kenya or Tanzania with no additional transportation cost. Arthur D. Little's study selected the Historic Route as Ethiopia's main tourist attraction for two reasons: (a) the Route includes all the major places of tourist interest. It can be included in international air tickets at no extra cost if the sector Addis-Asmara or reverse is already included (as it generally is), and (b) the Route is already accepted by the travel trade as Ethiopia's main tourist "circuit". The study focuses on attracting wealthy North American visitors with a few wealthy Europeans travelling on multi- country tours of Africa or on round-the-world trips. Ethiopia does not offer to foreign visitors attractive beaches, and the country does not have yet the infrastructure and the ground facilities permitting the handling of masses of tourists at competitive prices.

Arthur D. Little (1969) identified seven main categories of tourist markets for Ethiopia. These include (a) wealthy, educated people from Europe and America who come to enjoy the masterpieces of Ethiopia's art, its culture and its scenery; (b) Americans who for no particular reason, come to Ethiopia as part of a "Round Africa" tour; (c) the special interest group - mountain climbers, wildlife watchers, underwater fishers, anglers, etc.; (d) game hunters; (e) educated people with cultural interests similar to those in group one but with limited financial means; (f) business persons travelling to Ethiopia or to points further south who could be induced to extend their stay in the area to visit Ethiopia's unique tourist attractions, and (g) the expatriates living in Ethiopia. Ethiopia has a total of 36,970 square kilo meters of national parks, game reserves and sanctuaries. These are shown in Table 3-12.

Table 3-12
National Parks, Game Reserves and Sanctuaries
(sq km)

Location	Parks	Reserves	Sanctuaries
Shewa	1,370	700	-
Gonder	150	-	-
Keffa	3,450	-	-
Bale	3,000	2,100	-
Hararge	3,000	1,600	6,000
Gamo Gofa	2,900	7,900	-
Wello	-	3,000	-
Tigray	-	600	-
Sidamo	-	-	1,200
Total	13,870	15,900	7,200

Source: Central Statistical Authority Ethiopia Statistical Abstract 1988:7

These parks, reserves and sanctuaries are homes for some of the big game animals of which twenty one species of endemic mammals and several sub-species and races are found only in Ethiopia. Of the many national parks so far gazetted, the Simien Mountains National Park in Gonder was also declared a World Heritage Site in 1983. [Tourconsult 1990 159] Tourconsult further indicated that the ecological habitats supporting the most important concentration of wildlife are found at two distinct altitudinal levels, the highlands and the surrounding semi-arid and arid lowlands. The largest concentrations of wildlife in Ethiopia are found in the south western corner of the country where the national boundary meets the Sudan and Kenya. The Ethiopian Wildlife Conservation Organization, with little international support, has maintained strict hunting policies as a result of which the wildlife in the country is well protected. According to the Wildlife Conservation Organisation records a total of 75,890 domestic and 7,694 international tourists visited the National Parks between 1982/83 and 1989/90. Details are provided in Table 3-13

Table 3-13
National Parks Visitations 1982/83-1989/90

	Domestic	International	Total	% of Total
Abiyata	32,824	2,828	35,652	42.6
Awash	29,040	2,384	31,424	37.6
Nechi Sar	6,326	1,039	7,365	8.8
Bale	5,809	458	6,267	7.5
Mago	1,673	927	2,600	3.2
Omo	218	58	276	0.3
Total	75,890	7,694	83,584	100.0
% of total	90.8%	9.2%	100.0%	-

Source: Wildlife Conservation Organisation (Various Reports)

The most accessible national parks, Abiyata and Awash, attracted 80.2 per cent of the visitors. This is a clear indication that the development of infrastructure (eg roads) is vital for tourism to flourish. The Wildlife Conservation Organisation further reveal that these parks generated revenue of Birr 362,276 from the tourists between 1974/75 and 1989/90. Again, Table 3-14 shows that Awash and Abijata contributed for 78.2 per cent of the total revenue.

Table 3-14
Revenues Created Through Parks Visitations (Birr)
(1974/75-1989/90)

National Parks	Revenue	% of Total
Awash	193,196	53.3
Abiyata	90,091	24.9
Bale	35,263	9.7
Nechi Sar	32,329	8.9
Mago	10,947	3.1
Omo	450	0.1
Total	362,276	100.0

Source: Wildlife Conservation Organisation (Various Reports)

Tourconsult (1990:171) estimated that 25,470 international tourists will visit the Parks between 1990/91 and 1994/95. Based on the above statistics, on the average Birr 120,760 could be generated during the five year period, of which Awash could

generate Birr 64,365 and Abiyata could generate Birr 30,069 and the remaining four national parks could generate Birr 26,326. While a total of 83,584 tourists visited national parks [Table 3-13] in seven years (1982/83-1989/90) the projected visitations shown in Table 3-15 is below the average that could have been expected on the bases of historical data in Table 3-13. Projections on the bases of Table 3-15 could have indicated well over 59,700 visitors.

Table 3-15
Projected Parks Visitations

	Revenue	% of Total
1990/91	3,850	-
1991/92	4,660	21.0
1992/93	5,120	9.9
1993/94	5,640	10.1
1994/95	6,200	9.9
Total	25,470	

Source: Tourconsult Estimate

Of the projected total visitations, the two major national parks, Awash and Abiyata, could attract well over 20,000 visitors. In addition to the above national parks there are several parks and several green areas within Addis Ababa. Three of these parks were able to entertain over 280,000 visitors in 1989/90 from whom over Birr 140,000 was received. Apart from the historic sites, the national parks and wildlife, there are also museums that house great treasures which have historical, religious, and cultural significance to the country. The National Museum in Addis Ababa has about 1,400 different treasures. Table 3-16 the museum attracted over 20,000 visitors in 1988/89 of which 15,000 were domestic while the remaining 5,000 were international visitors. [Ministry of Culture and Sports Affairs 1989:15].

Table 3-16
National Museum Visitations

Year	Domestic	International	Total	% Change
1979/80	2,284	2,535	4,819	
1980/81	3,026	3,319	6,345	-31.7
1981/82	7,074	3,258	7,332	15.5
1982/83	3,057	2,079	5,156	-29.7
1983/84	4,220	2,572	6,792	31.7
1984/85	2,404	2,173	5,727	-15.7
1985/86	8,709	2,540	10,249	78.9
1986/87	7,081	3,186	10,267	0.2
1987/88	18,610	3,199	21,809	112.4
1988/89	15,274	5,363	20,637	-5.4
% Change 89/80	568.74%	111.58%	328.24%	

Source: Computed from Min. of Culture Annual Report

Domestic visitations jumped to 568.74 per cent over 1979/80 while international visitations grew by 111.58 per cent. It could also be seen that an average annual change was 1.56 per cent. There are a significant number of cinemas and theatres in Addis Ababa as well as in other major cities and towns. The Ethiopian National Theatre in Addis, for example, shows films from around the world as well as putting on musical concerts and dance performances [Crowther, 1989:294]. Other major entertainment centres in the capital include the Ambassador Theatre, City Hall Theatre and Cinema Ras. There are also many cultural institutes such as the Italian Cultural Institute, the German Cultural Institute, the British Council, etc that show programmes of entertainment. As Table 3-17 shows in 1987/88 130 films were imported and 1,451 films were viewed by 4.5 million persons generating a revenue of over Birr 6.3 million.

Table 3-17
Number of Imported and Exhibited 35mm Commercial
Long Films

Year	Imported	Distributed	(thousands Birr)		('000) Viewer
			Rental Fee	Receipts	
83/84	...	898	347.7	7025.4	4724.4
84/85	187	936	440.2	7017.2	5055.8
85/86	100	1065	416.5	7594.7	5295.0
86/87	212	1339	451.7	7861.5	5239.4
87/88	130	1451	328.5	6353.3	4523.6
% Change (88/84)	-30.48	61.58	-5.52	-9.57	-4.25

Source: CSA Ethiopia Statistical Abstract 1988:380

As the above Table shows, while the number of films distributed showed 61.58 per cent increase during the period, the number of viewers as well as revenues collected declined. In addition, imported films also declined significantly.

3.4 Travel Agency

One of the facilities necessary for the development of tourism is the availability of travel agencies and tour operators. Travel agencies act as intermediaries between suppliers of transport, accommodation and leisure services and the buying public. [Bureau of Industry Economics, 1983] Travel agencies know the customers' tastes and wishes, and through contacts with foreign correspondents they can anticipate market trends. They represent the industry as a whole to provide services and products to the consumer. [IANUS, 1969; Holloway and Plant, 1988; Hudman and Hawkins, 1989]. Today most international tourists depend on travel agencies for their "package" [Gamble, 1989]. Therefore, travel agencies occupy a leading place in the tourism industry as they provide the link with the customer. While in some developing countries they play a secondary role because of the limited scope of their activities, they are an important economic instrument in developed countries and in particular the main generators of tourism. [Wahab, 1975:159] As Coltman (1989)

Table 3-18
NTO Hosted Tourists 1985-1991

	Domestic	International	Total	Increase
1985	24,032	3,134	27,166	
1986	22,355	2,521	24,876	-8.4
1987	31,251	3,590	34,841	40.0
1988	33,197	4,106	37,303	7.1
1989	37,415	4,848	42,263	13.3
1990	30,970	2,808	33,778	-20.1
1991	23,404	1,233	24,637	-27.1
Total	202,624	22,240	224,864	
1991/1985	-2.6%	-60.6%	-9.3%	

Source: Computed from ETC Tourism Statistics 1992:30-31

Overall, the Organisation's operations were greatly affected by the closure of the Historic Routes in the north due to security problems in the areas. As a result the number of international visitors declined significantly. The general decline of the movements could be seen from Table 3-19

Table 3-19
NTO Hosted Visits to Various Tourist Areas

	1982/83	1988/89	Change
Addis Ababa	2,498	2,366	-5.3%
North West	1,839	435	-76.3%
East	874	240	-72.5%
North	588	-	-100.0%
South	390	414	6.1%
North East	277	-	-100.0%
Central	100	544	444.0%
West	65	51	-21.5%
Total	6,631	4,050	-38.9%

Source: Computed from ETC Tourism Statistics 1991

The hardest hit areas were the north and north-east of the country where many of historical attractions are located. Also significantly affected are north-west and eastern areas. However, organized tour picked up in the central region where security was good. This region provides historical, cultural as well as resort attractions. The Corporation was able to generate about 3.0 million Birr in foreign

exchange in 1990 as shown in Table 3-20. However, this is only a 0.7 per cent increase over the 1987 figure.

Table 3-20
Foreign Exchange Earnings by NTO ('000 Birr)

Year	Revenue	% Change
1987	3,009	
1988	3,652	21.4
1989	3,497	-4.2
1990	3,032	-13.3

Source: Computed from ETC Tourism Statistics 1991: 180

Table 3-20 shows revenues generated during 1987-1990. This decline could be attributed to the decline in international visitors as shown in Table 3-18. As shown in Table 3-21 investment requirements of the Organisation revealed that by the Year 1998/99 a total of 399 vehicles of various types will be acquired at a total cost of Birr 19.6 million, 31 per cent of which will be in foreign exchange [ONCCPSC 1989:111].

Table 3-21
NTO Investment Plan ('000 Birr)

Year	Investment	% Change
1989/90	2,410	
1990/91	1,465	-39.2
1991/92	2,805	91.5
1992/93	265	-90.5
1993/94	2,375	796.2
1994/95	1,780	-25.0
1995/96	1,953	9.7
1996/97	1,953	-
1997/98	2,006	2.7
1998/99	2,569	28.1

Source: Computed from ETC Tourism Statistics 1991

On the average, the NTO would require Birr 1,958.1 thousand in investment every year. However, 1992/93 was allocated the least amount. Since the introduction of the new economic policy in 1992 state monopoly in tour operations and hotels construction has been declining. One of the policy issues was to alter the role of the state in economic activity by limiting its participation to those fields that cannot be operated by private capital for various reasons through joint ventures or on its own. On this basis in the service industries areas that have substantial opportunities for new investments include marketing and promotion of export goods, medium- and large-scale construction, and hotels and tourism. The benefit of this policy on hotels and tourism is manifested in the sheer number of travel, tour, safari agents and car hire which currently operate in the country compared with only one agency, namely, National Tour Operation and Travel Agency [Ethiopian Tourism Commission, 1995],

3.5 Obstacles to the Development of Facilities in Ethiopia

The World Bank (1990a) indicated that private investment has been discouraged by ceilings on permissible fixed assets, licensing, high rates of personal taxation, employment protection legislation and discrimination in credit allocation. Public enterprises have been subject to planning directives, price and distribution controls, and labor allocation and fund provisions which have increased their costs and blunted their competitiveness. Furthermore, economic plans have been badly affected by the recent deterioration in the internal security situation. A Five-Year Plan (1990-1994), has been postponed indefinitely. However the May 1990 decree on investment was expected to remove many restrictions that hitherto have been a stumbling block to both domestic and foreign investors. For example, the existing capital ceiling was removed, foreign, private as well as joint venture investors were allowed to transfer their dividends, and exemptions from duties and taxes were made on products imported by joint ventures. [World Bank, 1990:196; Addis Ababa

Chamber of Commerce, 1991; Council of State, 1990; Council of Ministers, 1990; OIJV,1991]

Nevertheless, it will be some time before foreign private capital is injected into the economy. The country is not yet free from the horror image of the past. There is no democratically elected government. Political stability is not guaranteed. Facilities may be developed with external sources if and when there is a political stability in the country and its image is perceived by outsiders in a positive way. A private hotel manager in Addis Ababa revealed in an interview that although investment opportunities were declared in 1990, it was extremely difficult for his hotel chain to get the plots of land required for building hotels, almost impossible to get building materials such as cement from state owned enterprises and therefore, he was not very positive about the new economic policy's implementation. Ethiopia must be promoted in tourist brochures in order to attract prospective tourists. While Kenya, Tanzania, Zimbabwe, Botswana, Zambia are prominently featured in such brochures, Ethiopia appears in none. Wholesale tour operators surveyed by this author in Sydney, Melbourne and Perth indicated that they had never received promotional materials from the Ethiopian Tourism Commission, and whatever little they know about the country is based on media information. At the same time, other destinations such as Kenya supply these operators with the necessary information on a regular basis. The Wholesale Tour Operators survey revealed that image, political stability and promotional activities are rated high on the list of areas that need improvement in order to promote Ethiopia as a tourist destination.

3.6 Conclusion

To develop its tourism industry, Ethiopia should focus on more varied attractions than those offered by the Historic Route. New areas should be opened by creating appropriate tourist infrastructures. A circuit of game parks unique to those offered by East African countries must also be created. The availability of tourist attractions

in itself does not appeal for potential tourists. There must be adequate facilities to cater for the tourists. Availability and adequacy of such facilities must be brought to the attention of international tour operators and travel agencies which are intermediaries between the host destination and the tourists. Ethiopia needs to improve on these facilities without further delay. In closing, it is worth taking note of Schaefer's (1992:41) comments,

"Tourism is nonexistent at this time; however, ... hopes that the historical tourist routes to the ancient capitals and monasteries of Ethiopia can be revived and that the ... domestic network will again benefit from tourism. To this end, the Ethiopian Tourism Commission has begun considering the refurbishment of tourist hotels in Gonder, Lalibela and Aksum".

In general, despite abundant natural and man-made attractions Ethiopia has not been able to attract large tourist inflows. This calls for the overall review of the country's policy on tourism. Serious considerations should be given to the promotional campaign's to change people's perception of the country. Another major issue to be considered by the authorities is to clearly assess and target potential tourist markets. This would include reinforcement of the existing markets as well as new ones which have so far not been made aware of the country's tourist attractions. A viable approach would be to involve wholesale tour operators and to organise information tours of the country which could yield encouraging results. Unless the authorities give serious considerations to all avenues the chances of developing a viable tourism industry seem futile. Another very significant point to consider is the country's image problem. This must be changed at any cost. A favourable tourism policy, political stability, and internal security need to be addressed.

CHAPTER 4

ETHIOPIAN TOURISM HISTORY

4.1 Introduction

To understand the history of Ethiopian tourism it is imperative that one goes back to the period before the 1974 Revolution and follow through the turbulent periods. The creation of the Ethiopian Tourist Organization (ETO) in 1964 marked the first recognition of the importance of the public sector in the development of tourism. [Third Five Year Plan, 1969:XXII-3] As a recognition of the benefit of tourism to the economic growth of the country, the Imperial Ethiopian Government established the ETO by Imperial Order No. 36 of 1964. In this Order it was declared: (a) WHEREAS, it is in the national interest that tourists be encouraged and stimulated to visit Our Country, and (b) WHEREAS, it is necessary that a central administration be created to plan and implement programs to promote tourism, and to encourage the establishment and maintenance of necessary tourist facilities. The principal purpose of the Organization shall be to "stimulate and encourage tourism in Ethiopia and to facilitate the taking of all measures, both within and without Ethiopia to this end". [Order No. 36/1964:2]. To implement the above tasks the Organization was bestowed with the following powers, (a) to enter into contract with private, Governmental and semi-Governmental bodies and agencies in Ethiopia and abroad; (b) to establish branch offices, in Ethiopia and abroad; (c) to coordinate the operations of tourist facilities, services and attractions within Ethiopia; (d) to prepare and disseminate information concerning tourism in Ethiopia; (e) to coordinate and make recommendations concerning the activities of all Government Ministries, Departments, Public Authorities and provincial, municipal, and local administrations which concern tourism; (f) to encourage the establishment by private entities and organizations of tourist facilities and services; (g) to engage in the business of providing tourist facilities and services to the extent that the same are not adequately provided by private entities and organizations, and (h) to establish a system of

classification or otherwise determine the classes of hotels, inns, restaurants, transport services and of all other facilities and services catering to tourists when no such system of classification exists or has been agreed upon between interested associations.

The Organization was authorised with funds consisting of (a) all monies received by the Organization for services performed; (b) all contributions and donations; (c) any other monies received by the Organization as a result of activities carried out by it, and (d) an annual Government subsidy. The Organization's activities were measured by means of Annual Reports which together with a program of work for the coming year, shall be submitted to the Prime Minister within three months after the end of each fiscal year. With the establishment of an autonomous organization to deal with tourism, the main objectives of the Government policy were to prepare, publish and adhere to a specific program, and to encourage the activities of the private sector in assisting tourist expansion [TFYP 1969:XXII-9]. Although Ethiopia, for the first time in its history, in the late sixties, embarked on the promotion and development of the tourist trade, in its early stage the industry suffered from lack of an integrated policy, trained manpower, financial and material support [Ethiopian Tourism Commission,1982:1]. This became obvious as the Ethiopian Tourist Organization's accountability constantly shifted from one Ministry to another: from the Office of the Prime Minister and the Minister of Pen to the Ministry of Information, to the Ministry of Commerce, Industry and Tourism [IBRD, 1970:33; NRDCCPSC, 1982:3]. Because of a constant lack of funds, the ETO gradually developed a series of commercial activities in order to generate extra funds. ETO established the Ethiopian Tourist Trading Company (ETTC) in order to generate the necessary revenue for the running of day-to-day activities of the Organization [IBRD. 1970:34; NRDCCPSC, 1982:4]. Thus gift shops, duty-free shops and bonded warehouses were opened, the production of handicrafts and gifts encouraged and car-hire services were all introduced into the system. In order to

generate sufficient funds, the Organization was forced to compete with private enterprises in providing tourist facilities such as travel agency services, tour operation, and car-hire. In 1980 there were twelve private organizations offering travel agency and car hire services, with seven of the twelve also acting as tour-operators. [Tourconsult, 1983:12]. Nonetheless, because there existed a favorable policy in visa issuance to tourists relative to the post-revolution periods, the number of international visitors showed remarkable growth between 1964 and 1974.

Tourists were granted a 30 day visa at point of entry upon presentation of return air tickets [NRDCCPSC, 1982:5]. This helped the inflow of tourists in subsequent years up to 1974. However, the lack of skilled manpower was one of the major problems affecting tourism development, and as a result the Ethiopian Tourist Organization was forced to rely on expatriate staff to fill the gaps. In order to alleviate this shortcoming, the Organization established the first and sole catering school in the country, the Catering and Tourist Training Institute (CTTI). The focus of ETO on publications, advertising and promotions was lacking in basic policy implementation. The Third Five Year Development Plan (1969:9-10) urged that the ETO in future be re-oriented towards emphasizing much more deeply its executive position in the carrying out of Government policy which covers basic research, coordination, maintenance of standards, etc. in order to pay particular attention to accommodations and transport facilities...Notwithstanding insufficient funding, lack of skilled manpower, and vaguely defined goals on the part of the ETO, there was an increase in the number of international tourists visiting the country between 1964 and 1974 as can be seen in Table 4-1.

Table 4-1
Tourist Arrivals And Revenue

Year	Arrivals	% Growth	Revenue (Birr) (million)	% Growth
1964	18,681	-	5.4	-
1965	18,526	(0.8)	5.5	1.8
1966	34,069	83.9	8.7	58.2
1967	27,927	(18.0)	9.1	4.6
1968	35,431	68.0	11.8	29.7
1969	45,921	29.6	13.5	14.4
1970	48,792	6.2	16.4	21.5
1971	60,079	23.1	15.5	(5.5)
1972	63,440	5.6	21.7	40.0
1973	65,396	3.1	24.9	14.7
1974	65,537	0.2	25.0	0.4

Key: () = negative growth

Source: NRDCCPSC, 1982:6

Between 1964 and 1974 the number of tourists visiting Ethiopia grew by an average annual rate of 13.4 per cent and the revenue from these tourists, excluding international air fares, grew by 16.6 per cent. However, this growth was not even. For example, while 1966 witnessed a dramatic increase over the previous year, 1967 showed a negative change (-18.0 per cent) and the change over 1973 was trivial. The composition of tourists who visited the country during the period was from: Europe (43.6 per cent); America (24.6 per cent); Africa (15.6 per cent); Asia (15.0 per cent), and others (1.2 per cent). As can be seen from the above list, European and American tourists accounted for 68.2 per cent. On the other hand, motives of their visits indicate that holiday makers were the largest group with 41.0 per cent followed by business (15.0 per cent) transit (12.0 per cent), conference (7.0 per cent), and others (25.0 per cent). Although the growth of tourism was evident, the lack of integrated programs hindered the ETO from implementing adequate policy guidelines.

4.2 The Ethiopian Hotels and Tourism Corporation

With the 1974 political change, tourism development lost credence. For a long time Ethiopia closed its doors to tourists. The country's isolation was most complete during the late 1970s, when internal strife was at its height. [Abebe, 1988:58-59] The Provisional Military Government established the Ethiopian Hotels and Tourism Corporation by Regulation No. 21/1975 which was made accountable to the then Ministry of National Resources Development. The issuance of guidelines by the Ministry of Commerce and Tourism in 1977 to control the entry of tourists into the country and their subsequent movements, featured prominently during this period. The guideline strictly limited tourism development by labelling Western tourists as 'spies', 'counter-revolutionaries' or 'conspirators' against the Revolution. This policy has been the major obstacle for the growth of tourism in the country since the 1974 Revolution and has contributed to the decline of the tourist flow into the country as shown in Table 4-2. Tourist arrivals in 1980 was 21.05 per cent lower than in 1974 and the revenue was 30.63 per cent lower than it was in 1974.

Table 4-2
Tourist Arrivals And Earnings

Year	Arrivals	% Growth	Revenue (Birr) (million)	% Growth
1974	53,220	-	22.2	-
1975	30,640	(42.4)	15.1	(32.0)
1976	36,924	20.5	12.1	(19.9)
1977	28,948	(21.6)	6.2	(48.8)
1978	30,817	6.4	7.4	19.4
1979	36,400	18.1	11.8	59.4
1980	42,000	15.4	15.4	30.5
% Change 80/74	(21.05)		(30.63)	

Key: () = negative growth

Source: Ethiopian Tourism Commission, 1981:45

During the last seven years the average annual rate of growth of tourists visiting the country was a negative 7.35 per cent and revenue fell by negative 1.4 per cent for the same period.

4.3 The Ethiopian Tourism Commission

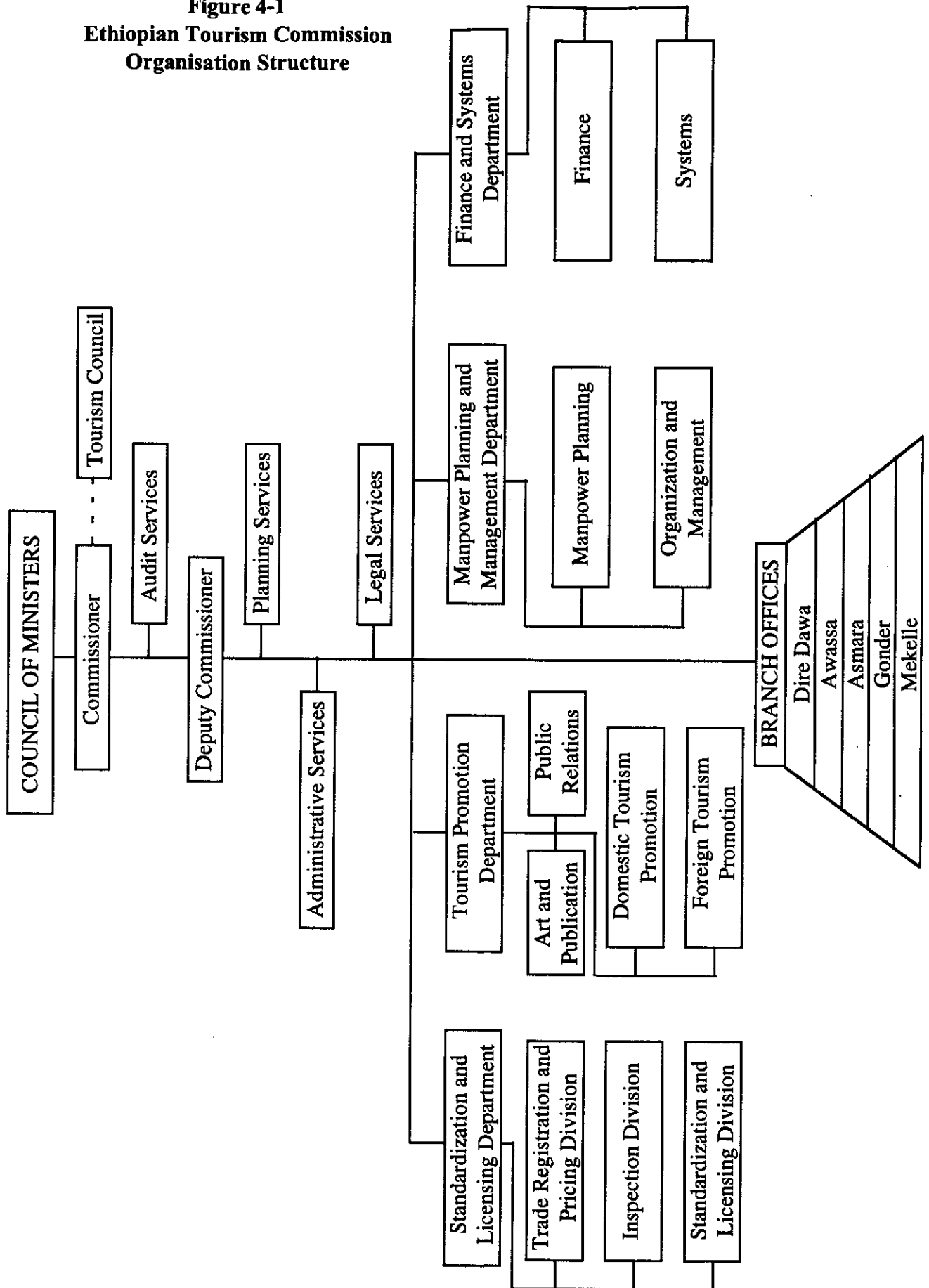
The Provisional Military Government after abolishing the then Ethiopian Hotels and Tourism Corporation established another body, The Ethiopian Tourism Commission (ETC) by Proclamation No. 182/1980. This Proclamation at least achieved one major change to the status of the new Commission, i.e. the Commission was made accountable to the Office of the Chairman of the Council of Ministers. The rationale behind the establishment of the Commission as indicated by the Proclamation were as follows: (a) tourism creates and fosters, through cultural contact and exchange of values, mutual understanding and goodwill among the various nationalities of Ethiopia and among the peoples of Ethiopia and other countries; (b) since the tourism industry is a source of revenue, its expansion will contribute to the economic development of the country, and (c) benefits from the tourism industry can best be tapped by the establishment of a body that specialises in the same. The Ethiopian Tourism Commission was established with the following objectives: (a) to develop and promote tourism, and (b) to make the necessary efforts, in cooperation with concerned Government offices, for the maintenance and development of the national resources and historical heritages of the country with a view to attracting tourists.

Powers were vested on the Commission to fulfil its objective in: (a) establishing and supervising organizations engaged in the provision of tourist facilities; (b) issuing, suspending or cancelling licence to persons or organizations engaged in the provision of tourist facilities; (c) coordinating, controlling and encouraging persons or organizations engaged in the provision of tourist facilities; (d) fixing the standards of tourist facilities; (e) delegating part of its power to other Government offices when deemed necessary; (f) preparing and submitting to the appropriate Government offices the rates to be charged for services rendered by organizations engaged in providing tourist facilities; (g) in cooperation with the appropriate Government offices, identifying, registering and encouraging the expansion of resources of tourist attractions; (h) publicising the tourist attraction resources of the country; (i)

establishing, administering, expanding and controlling, in cooperation with the appropriate offices, training centres for personnel to be engaged in tourist facilities; (j) establishing contacts and signing agreements as may be appropriate with public or private organizations on matters relating to tourism; (k) making necessary research and investigation for tourism development and applying the result to practical work, and (l) preparing and disseminating information concerning tourism. To oversee the overall activities of the Commission a Tourism Council was created with powers to: (a) initiate policy regarding tourism with the strategy thereto and submit same to the Office of the Chairman of the Council of Ministers, and (b) make proposals to the same Office concerning the promotion of tourism and the contributions to be made by the concerned Government Offices.

The budget of the Commission is drawn from (a) service fees collected by the Commission for services it renders; (b) contributions and donations., and (c) government budgeting support. With all rights, obligations, assets and liabilities of the former Ethiopian Tourist Organization transferred to the Commission, the latter further strengthened its power base by controlling the National Hotels Corporation (NHC), the National Tour Operation and Travel Agency Corporation (NTO), and the Tourist Trading Corporation (ETTC) on the bases of the Legal Notices Nos. 88/1985, 89/1985 and 90/1985, respectively. The Commission also supervises the Catering and Tourism Training Institute (CTTI), the only training institute for the country's tourism industry [Figure 4-1].

Figure 4-1
Ethiopian Tourism Commission
Organisation Structure



While the CTTI is engaged in the training of personnel for the Industry, the NHC, ETTC and NTO are engaged in commercial activities and have been sole providers of tourist facilities. The NHC was mandated (a) to engage in the business of hotel services by establishing, organising, expanding and operating hotel services, and (b) to engage in any other business activity necessary for the attainment of its objectives. The National Tour Operation and Travel Agency Corporation (NTO) was mandated to engage in the business of tour operation and travel agency; The Ethiopian Tourist Trading Corporation (ETTC) was mandated to engage in activities of selling articles of tourist interest. After the establishment of the Commission, a new tourism policy was introduced to regulate the flow of tourists into the country. The policy covers the following areas: (a) welcoming individual and/or group tourists from all over the world except those barred from entering the country; (b) requiring from tourists possession of the necessary travel documents, visa and sufficient foreign exchange; (c) declaring the basic mode of entry into the country by air and through Addis Ababa, Asmara and Dire Dawa; (d) permitting tourists to stay only in hotels approved by the ETC; (e) requiring that travel within the country is by modes of travel approved by ETC; (f) issuing details of necessary facilities and places of visits; (g) controlling illegal activities in foreign exchange; (h) encouraging domestic tourism; (i) preserving natural and man-made tourist attractions; (j) controlling undesirable social problems, and (k) demanding cooperation of all concerned Departments [ETC, 1981:Annex 1].

4.4 Need for Tourism

Peterson (1990:56) stressed that tourism is the world's leading employer, and among the leading contributors to the world's economic, social, and ... it is one of the most efficient sources of new wealth for most nations. The Courier, (1990:60) put it thus, "The industry is one of the biggest employers worldwide, with jobs for an estimated 100 million workers...". Sako (1990:69) emphasised that many economic benefits were expected from tourist development and he particularly identified the industry's

importance in relation to foreign exchange earnings, new jobs, a boost for the local production of the goods and services consumed by the tourists, and the integration of the national cultures and societies and safeguarding of the national cultural identity. According to the Australian Tourism Commission (1988:2) tourism, in the last two decades has risen to prominence through its ability to generate rapid economic growth in terms of jobs, income, standard of living and the stimulation of other productive sectors of the economy. The Commission (1988:9) further stated that tourism in Australia accounts for a substantial proportion of consumer spending, provides significant employment and is a major earner of foreign currency. Governments and the community at large are beginning to recognise that a service industry such as tourism is as economically productive and no less beneficial than industries in other sectors producing tangible goods.

The importance of tourism to Ethiopia has time and again been emphasised in various legislation establishing tourist departments since 1964. The Ethiopian Tourism Commission (1982:2) reiterated the importance of tourism lies in the social intermingling and more particularly, in the expansion of the international tourist trade, employment and income. As one of the poorest countries in the world depending on agriculture, yet with immense natural and man-made attractions, the country can benefit from properly planned tourism development. The foreign exchange earnings that are badly needed and the number of jobs that should be created, are but two prominent benefits for the country which has been hardest hit by civil war and drought. According to the 1986/87 survey conducted by the Ministry of Labor and Social Affairs, employment in the tourism sector accounted for 3.82 per cent of the total employment in the public sector. The Ethiopian Tourism Commission statistics indicates in Table 4-3 that 6531 persons were employed within the Institution alone in 1990.

Table 4-3
Employment Statistics (permanent) 1981-1990

DEPT	81	82	83	84	85	86	87	88	89	90
ETC HQ	147	158	197	191	190	193	206	211	209	206
ETTC	365	386	427	446	451	520	535	575	611	656
NTO	41	82	91	238	230	308	304	298	311	318
CTTI	28	37	41	43	48	53	50	51	52	58
NHC	4085	4288	4608	5186	5186	5211	5393	5372	5296	5293
TOTAL	4666	4951	5364	6105	6105	6285	6488	6507	6479	6531
% growth	-	6.1	8.3	8.1	5.3	2.9	3.2	0.3	(0.4)	0.8

SOURCE: Manpower Planning & Management Department, ETC

Key	
ETC HQ	= Ethiopian Tourism Commission Head Office
ETTC	= Ethiopian Tourism Trading Corporation
NTO	= National Tour Operation and Travel Agency Organisation
CTTI	= Catering and Tourist Training Institute
NHC	= National Hotels Corporation

If one looks back to 1964 when there were only 60 employees in the sector, the growth might seem astronomical. However, compared with the world growth of this sector, the bare realities of the evolutionary decline of the country's tourism becomes apparent. This can be seen from progressive decline in yearly employment statistics culminating in -0.4 per cent in 1989. As Table 4-4 shows, between 1964 and 1974 tourist arrivals grew considerably. However, this trend did not last long as the 1974 political change discouraged the movement. The 1964, 1974 annual average growth is 18.26 per cent while 1975-1988 statistics reveal that the average annual growth rate is only 1.42 per cent.

Table 4-4
Ethiopia - Tourist Arrivals (1964-1988)

Year	Arrivals	% Growth
1964	16,861	-
1965	18,526	(0.8)
1966	34,069	83.9
1967	27,927	(18.0)
1968	35,431	68.0
1969	45,921	29.6
1970	48,792	6.2
1971	60,079	23.1
1972	63,440	5.6
1973	65,396	3.1
1974	65,537	0.2
1975	30,640	(53.2)
1976	36,927	20.5
1977	28,984	(21.5)
1978	27,568	(4.9)
1979	33,795	22.6
1980	39,504	16.9
1981	41,630	5.4
1982	55,014	21.1
1983	55,665	1.2
1984	59,621	7.1
1985	61,459	3.1
1986	58,529	(4.8)
1987	60,436	3.3
1988	62,303	3.1

Key: () negative growth

Sources: NRDCCPSC (1982:6), Tourconsult (1990:34)

As can be seen from the above Table, tourist arrivals were erratic with the lowest annual rate of growth in 1975 immediately after the change in the country's political system in September 1974. The overall growth rate for the past 25 years was 13.7 per cent. On the other hand, the lowest annual rate of growth for tourist revenue was in 1967 and the overall average annual rate of growth for the period was 7.1 per cent. This is shown in Table 4-5.

Table 4-5
Ethiopia - Tourism Revenue (1964-1988)

Year	Revenue (million Birr)	% Growth
1964	5.4	-
1965	5.5	1.8
1966	8.7	58.2
1967	9.1	4.6
1968	11.8	29.7
1969	13.5	14.4
1970	16.4	21.5
1971	15.5	(5.5)
1972	21.7	40.0
1973	24.9	14.7
1974	25.0	0.4
1975	15.1a	(39.6)
1976	12.4	(17.9)
1977	6.2	(50.0)
1978	7.4	19.3
1979	11.8	59.5
1980	14.7	24.6
1981	15.9	8.2
1982	22.2b	39.6
1983	16.6c	(25.2)
1984	12.4	(25.3)
1985	18.6	50.0
1986	10.3	(44.6)
1987	14.5	40.8
1988	8.3	(42.8)

Key: () negative growth%

Sources: a. 1975 - 1981: ETC, 1982:3 b. 1982: ETC, 1981:17 c.

1985 - 88 : Tourconsult, 1990: 25, 35

The most drastic decline in revenue was recorded between 1975 and 1977 immediately after the 1974 Revolution.

4-5 Origins Of Tourists To Ethiopia

Tourists came from the Americas, Europe, Asia, Africa etc. and their purposes of visit was one of holiday, business, transit, visiting families and relatives, and others.

The major markets of tourists to Ethiopia have been the Americans and Europeans.

Patterns of these markets are shown in Table 4-6.

Table 4-6
Origin Of Tourists To Ethiopia 1970-1988
(percentage change over previous year)

Year	Africa	Americas	Asia	Europe	Oceania	Others	Nationals*
1970	-	9.9	34.6	6.3	-	21.9	-
1971	-	2.3	45.3	(3.4)	-	(1.4)	-
1972	-	31.6	-	49.5	-	-	-
1973	-	20.7	0	(0.8)	-	-	-
1974	-	(31.7)	(24.3)	(38.7)	-	-	-
1975	-	(50.0)	(48.6)	(39.3)	-	(27.2)	-
1976	-	(2.7)	(11.0)	8.7	-	-	-
1977	-	(57.6)	29.9	(39.8)	-	-	-
1978	-	(33.0)	(31.1)	(31.7)	-	-	-
1979	10.7	32.4	177.1	35.3	90.4	4.3	-
1980	(73.2)	(7.6)	(59.3)	(2.7)	(27.3)	-	-
1981	277.7	50.9	60.8	120.1	2605.6	-	-
1982	60.7	36.1	31.0	22.9	(2.7)	-	-
1983	15.3	19.5	(25.8)	9.9	(25.9)	(11.6)	-
1984	(22.1)	(12.6)	(13.2)	11.0	7.0	(89.9)	-
1985	7.2	19.4	10.5	7.5	6.4	-	(2.6)
1986	9.6	(32.2)	(6.9)	(11.9)	(6.0)	-	-
1987	(1.1)	28.5	2.4	(0.9)	14.6	-	2.8
1988	(1.8)	(0.4)	9.3	8.6	5.0	(77.9)	4.1
Growth %	25.7	1.2	6.7	5.9	242.5	(-22.7)	1.1

* = Ethiopian Nationals residing abroad

Source : Computation based on Tourconsult (1990 : 34)

During the last nineteen years, tourists arriving from Africa showed an annual average growth of 25.7 per cent while those from the Americas were only 1.2 per cent. By far the biggest growth was from Oceania. This was due to low arrival rate in 1980 and subsequent jump in arrivals in 1981/4, 789. It is evident that immediately preceding the 1974 change of government the country's major tourist markets had been Europeans and Americans who between themselves accounted for 68.2 per cent of the total. This trend changed in subsequent years. As shown in Table 4-7 the 1987 figure, for example, makes this point clear.

Table 4-7
Changes in Tourist Arrivals (1987)

Region	% Share
Africa	45.5
Europe	27.8
Middle East	11.8
Asia	8.5
Americas	6.2
Others	0.2

Source: Haile (1989:13)

Over the last two decades the average annual growth rate of tourists from various regions is summarised in Table 4-8.

Table 4-8
Changes in Annual Tourist Arrival Rates

Region	Growth Rate (%)
Oceania	242.5
Africa	25.7
Asia	6.7
Europe	5.9
Americas	1.2
Nationals resident abroad	1.1
Others	-22.7

The African rate was high due to numerous conferences being held in Addis Ababa under the auspices of the Organization of African Unity (OAU), the United Nations Economic Commission for Africa (ECA) and other international organisations which have their regional offices in Addis Ababa. According to conference statistics compiled by the Ethiopian Tourism Commission, between 1985 and 1991 a total of 547 conferences were held in Addis Ababa and the number of participants totalled 38,482; averaging to 78 conferences and 5,640 participants a year. This is significant considering the overall poor performance of the tourism sector in the country. Comparison with the 1974 arrival rate shows a further shift in the market

configurations. The market in 1974 had been dominated by Europe and the Americas, whereas Africa dominated in 1987 [Table 4-9].

Table 4-9
Regional Share of Arriving Tourists

Region	1974 Share (%)	1987 Share (%)
Europe	43.6	27.8
Americas	24.6	6.2
Africa	15.6	45.5
Asia	15.0	8.5
Middle East	-	11.8
Others	1.2	0.2

The sharp decline in the American and European markets was associated with the government's new policy restricting entry formalities for tourists from these regions and the subsequent deterioration of security in major tourist attraction centres such as the Historic Routes. Africa's increase is attributed more to the arrival of transit passengers from Southern, Western, Central and Eastern African countries rather than holiday makers. The Middle East figure is attributed to the influx of Yemen tourists in search of a cool climate and night-life. However, as Kurian (1982:603) observed:

The tourist industry has slumped badly since the revolution. Tourists are not visiting Ethiopia in nearly the numbers they did in pre-revolutionary days. ... Ethiopia has many fine tourist attractions and prior to the revolution was developing a considerable tourist industry. The prospects for tourism appear dim, however, due to travel restrictions, security problems and adverse international press coverage.

The National Tour Operation and Travel Agency Corporation (NTO) annual reports support this statement. There has been a great shift in the visitation of various tourist

areas. According to NTO 6,591 tourists visited various sites in 1983. This figure dropped to 4,050 in 1989, an annual average decline of 5.5 per cent.

4-6 Motivations For Visitations

Gamble's (1989:1) expression of motivation for travel include psychological, cultural, social and escapist. Dickman (1989:107) indicated that people travel for the following reasons: holiday, business, visiting relatives, transiting, and convention. Davidoff et al (1988:18) outlined a comprehensive list of reasons why people travel. These include: to visit friends and relatives; to conduct business; to see new places and learn new things; to learn how other people live, work, and play; to see how their ancestors lived; to do things they can not do at home (skiing, for example); to rest and relax, and to improve their health. Whatever the motives to travel, people make decisions to travel either on their own or through the influence of their family and friends, or because of business contacts or any other factor. Basically, factors that motivate people to travel can be summarised as follows: (a) information of the destination from friends/relatives who have been there; (b) media; (c) family; (d) friends; (e) activities available in the destination; (f) contacts in the destination, and (g) personal knowledge of the destination. Tourists visited Ethiopia for various purposes as shown in Table 4-10. Business, holiday, visiting relatives and friends, transiting etc. are the major reasons. Transit statistics are included here in the understanding that the term "transit tourist" follows the World Tourist Organisation classification that includes transit passengers in the statistics if they stay one day or more in the country where they are transiting [OECD, 1989].

Table 4-10
International Tourist Arrivals By Purpose Of Visit (%)

Year	Business	Conference	Vacation	Transit	Other
1973	15.2	8.5	41.1	10.8	24.4
1974	16.4	6.4	37.1	14.1	26.0
1975	20.4	6.0	27.0	20.5	26.1
1976	18.8	7.5	25.4	17.5	30.8
1977	17.6	4.8	17.6	20.2	39.8
1978	17.3	5.4	10.7	20.8	45.8
1979	16.7	6.6	12.9	20.1	43.7
1980	17.1	7.5	12.4	14.5	48.5
1981	16.5	6.6	13.7	19.9	43.3
Average %	17.3	6.6	22.0	17.6	36.5

Computed from Ethiopian Tourism Commission (1982:3)

Over one-third of the arrivals between 1973 and 1981 did not specify their purpose of visit. This indicates that the true picture of the motives of visits cannot sufficiently be determined. Of those who indicated their purposes, vacation takers cover 22 per cent of the total, whereas business travellers and transit travellers account for 17.3 per cent and 17.6 per cent, respectively. Comparison of the foregoing with Table 4-11 indicates a general shift in the purpose of visit.

Table 4-11
International Visitor Arrivals By Purpose Of Visit (%)

Year	Business	Conference	Vacation	Transit	Other
1982	19.7	-	27.2	19.2	33.8
1983	27.8	-	25.4	19.4	27.3
1984	28.9	-	26.0	19.5	25.6
1985	34.2	-	24.2	19.7	21.9
1986	35.6	-	25.2	20.5	-
1987	27.1	4.0	20.8	17.3	2.9
1988	23.8	6.2	15.8	18.5	5.8
1989	22.4	5.9	16.0	25.3	30.4
1990	24.6	9.4	19.1	16.1	30.7
1991	31.9	9.3	19.2	16.1	30.7
Average %	27.6	3.4	21.8	19.1	28.6

Computed from Ethiopian Tourism Commission (1990, 1992)

Table 4-12 shows percentage changes between the two periods for various purposes of visit. There is a significant increase in business visits (17.3 per cent versus 27.6 per cent) and a decrease in other visitors (36.5 per cent vs 28.6 per cent) as well.

Table 4-12
Percentage Changes in Purposes of Visitations

	1973 - 1981	1982 - 1991	% Change
Business	17.3	27.6	10.3
Conference	6.6	3.4	-3.2
Vacation (Holiday)	22.0	21.8	-0.2
Transit	17.6	19.1	1.5
Other	36.5	28.6	-7.9

More than a quarter of the visitors did not indicate their purpose. This suggests that there may be some deficiency in the cards used to collect information from arriving as well as departing visitors. Ethiopia is perceived negatively because of its political instability. Ethiopia has been performing badly compared with some African countries some of which in fact do not have a diverse tourist attraction similar to Ethiopia.

4.7 Conclusion

In general, despite abundant natural and man-made attractions Ethiopia has not been able to attract large tourist inflows. This calls for the overall review of the country's policy on tourism. Serious considerations should be given to the promotional campaign's to change people's perception of the country. Another major issue to be considered by the authorities is to clearly assess and target potential tourist markets. This would include reinforcement of the existing markets as well as new ones which have so far not been made aware of the country's tourist attractions. A viable approach would be to involve wholesale tour operators and to organise information tours of the country which could yield encouraging results. Unless the authorities give serious considerations to all avenues the chances of developing a viable tourism

industry seem futile. Another very significant point to consider is the country's image problem. This must be changed at any cost. A favourable tourism policy, political stability, and internal security need to be addressed.

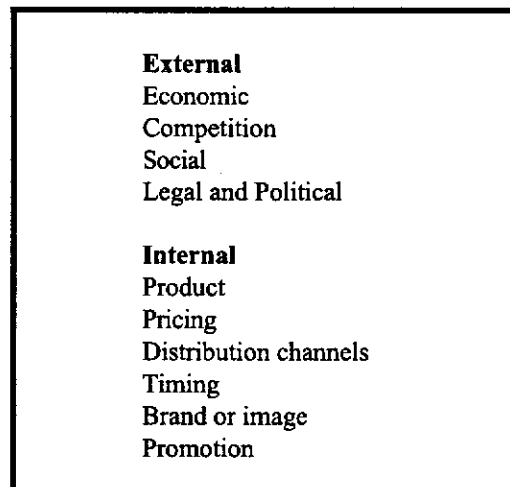
CHAPTER 5

THE MARKETING OF TOURISM

5.1 Introduction

Marketing is the management function which organises and directs all those business activities involved in assessing customer needs and converting customer purchasing power into effective demand for a specific product or service, and in moving that product or service to the final consumer or user so as to achieve the profit target or other objectives set by the company or other organisation [Holloway and Plant, 1988:3-4]. Marketing is, the sum total of the activities involved in getting products and services from producers to consumers. This means ensuring that the right product is developed at the right price and promoted through the right places to create a satisfied customer at a profit for the producer. According to Reilly (1988) elements of marketing include (a) the product or service itself; (b) method of distribution; (c) location; (d) method of pricing, and (e) means of promotion. Both external and internal environmental factors will have an effect on an organization's marketing decisions. Coltman (1988:12-13) categorized these factors as shown in Figure 5-1.

Figure 5-1
Internal and External Factors



Marketing means establishing the needs and desires of the current and potential customer, and developing products that will satisfy those needs at a standard required by both consumers and suppliers, and in such a manner that it will be profitable for the supplier and satisfactory to the consumer [Dickman,1989:214].

5.2 Tourism Marketing Defined

Tourism marketing can be defined as the management process through which tourist organizations identify their selected tourists, actual and potential, and communicate with them to ascertain and influence their needs, desires, and motivations on local, regional, national and international levels, in order to formulate and adapt their tourist products accordingly in view of achieving optimal tourist satisfaction and maximizing organizational goals. [Witt and Moutinho 1989:259]. Tourism marketing involves market research, product planning, advertising and promotion, channels of distribution, pricing, and marketability. Dickman (1989:216) forwards questions that marketers must ask in order to map out a general plan for what direction tourism marketing and promotion should take. The questions to be asked include: (a) who are our present customers and where do they live? (b) what do we know about their likes and dislikes? (c) who are our potential markets and where do they live? (d) what are the potential markets' current preferences and interests? (e) what are the specific destinations? (f) what specific attractions have they come to see? (g) what is their general level of awareness of attractions? (h) what are the tourists' preferences for shopping, accommodation, and entertainment? (I) what is the competition like? (j) what are the trends? (k) what are the likely future needs for this share of the market? (l) what are the prospects for increasing demand? (m) what kinds of programs will be needed? (n) what types of programs should be run, in terms of frequency, duration, intensity? (o) how will these programs be implemented?

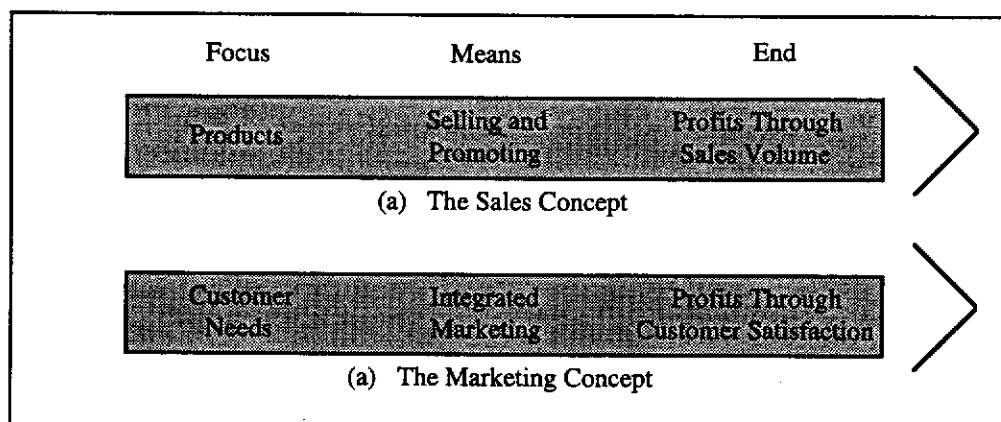
5.3 Orientation

Traditionally tourism marketing has been product-oriented. The marketing effort is focussed on providing the "best" beaches, rooms, etc. which tourists would automatically visit. This is geared towards the interests of the producers. Tourism marketing, however, is an application of consumer behavior, business and economics [Ritchie and Goeldner,1987:6]. Calantone and Mazanec (1991:108) indicated:

Tourism is one of the last industries to experience the change from sellers to a buyer's market. Marketing techniques, therefore, are still less advanced than those in the branded goods industries, where managers have been accustomed to a fastidious and discriminating customer for many years.

Recent developments, however, indicate that this approach works only when there is more demand than supply. The new trend advocates that a marketing orientation should focus on the tourist - and should see the vacation through the eyes of the tourist. [Mill, 1990:285]. With the introduction of the marketing concept, customers became the focal point of the businesses and marketing activities were organised to help them [Coltman, 1989:10]. Kotler (1972) wrote that the marketing concept is a "customer orientation backed by integrated marketing aimed at generating customer satisfaction as the key to satisfy organizational goals". [Figure 5-2 shows this concept.

**Figure 5-2
The Sales and Marketing Concepts Integrated**



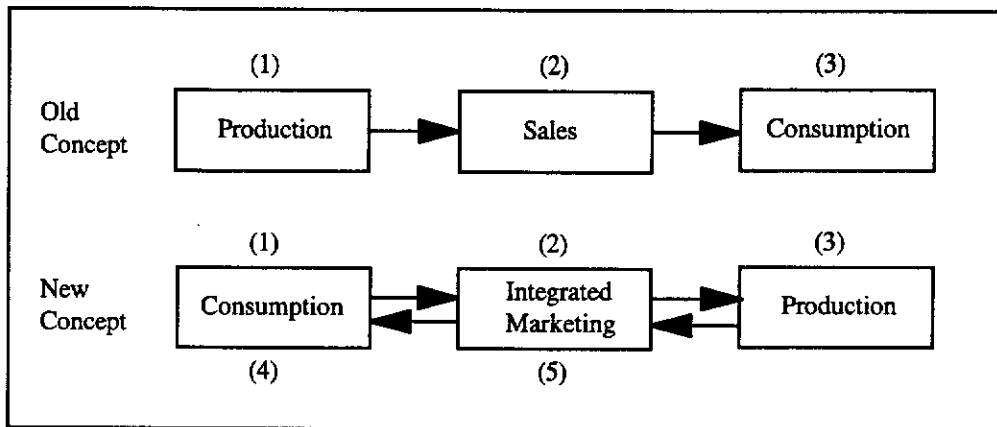
Source:

Kotler, 1972:17

On the other hand, Wahab (1975:101-102) stated that in tourism where the product is an amalgam of various elements or components, some of which are tangible and some are intangible (services) the only open path for the organization would be to inform itself about consumer needs, expectations, attitudes of mind, likes and dislikes in order to formulate and constantly develop the tourist supply components or products.

According to Wahab, the marketing concept should therefore be understood as a re-orientation of the business policy and an overhaul of the organization's or enterprise's management concepts and practices. The marketing concept, therefore, facilitates a breakthrough in the tourism system as shown in Figure 5-3.

Figure 5-3
The Marketing Concept



Source: Wahab, 1975:101-102

Wahab (1975:105) reiterated that tourism marketing calls for the systematic and coordinated efforts exerted by the National Tourism Organizations (NTOs) and/or the tourist enterprises on international, national and local levels to optimise the satisfaction of tourists, groups and individuals, in view of a sustained tourism growth. He further suggested that tourism marketing mix should include product policy, pricing policy, promotion programs, and points or channels of distribution.

5.4 Tourism Marketing vs Manufactured Products Marketing

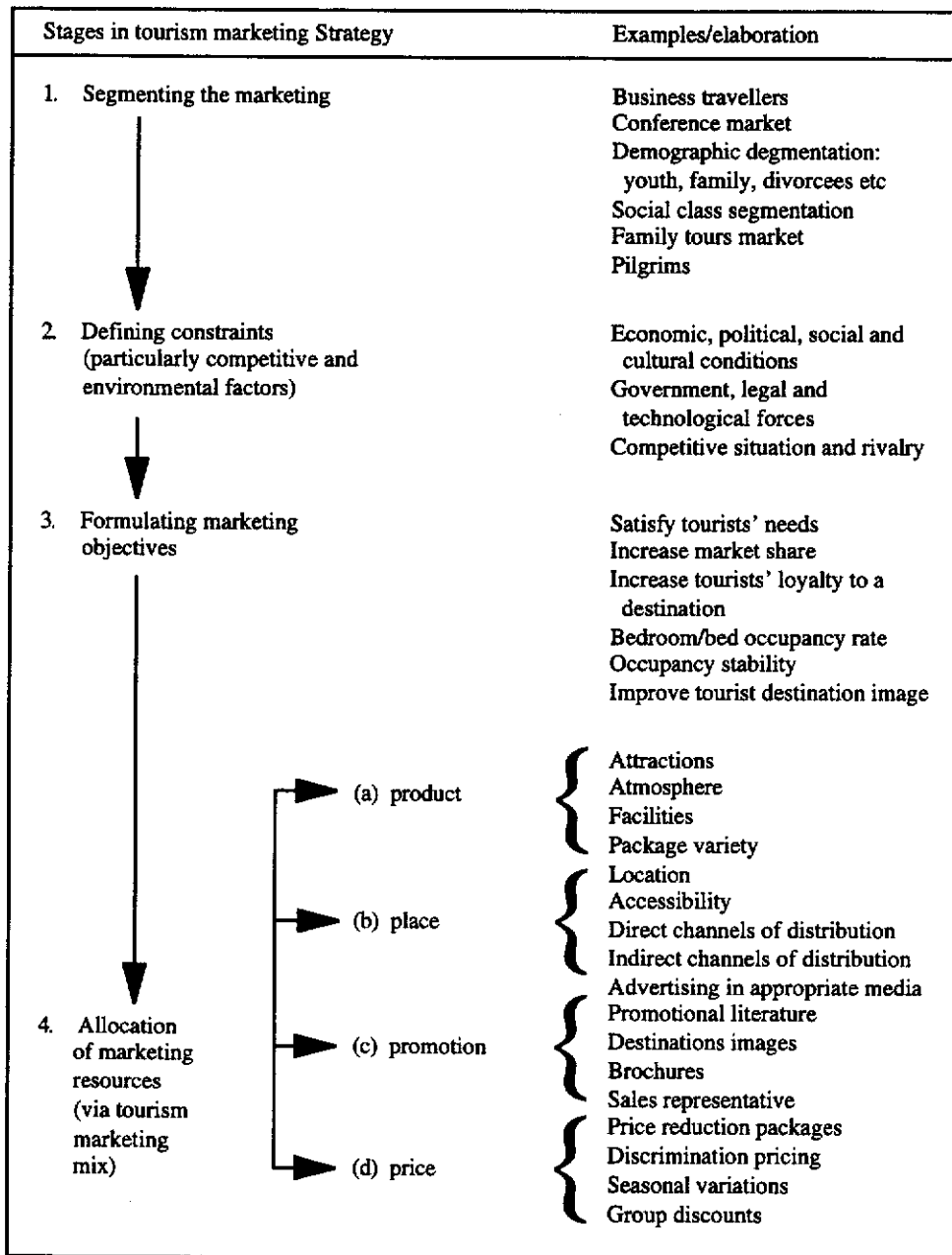
The marketing of tourism is different from marketing in the manufacturing industries. [Mill 1990:284]. Likewise, the problems associated with marketing in tourism are different from the problems associated with the traditional, product marketing due to the special characteristics of tourism supply and demand. Gilbert (1990:20) indicated that some of the characteristics of tourism that differentiate it from goods are rigidity of supply and seasonality of demand. Mill and Morrison (1985:357-358), Cowell (1981), Greenley and Matcham (1990:39) as well as Gilbert (1989) identified these characteristics: (a) tourism is a service where an intangible experience is sold and production and consumption take place at the same time, and that tourism supply cannot be stored; (b) the service provided is an amalgam of several products and services such as transportation, accommodation, food and drink, attraction, activities, etc. which are offered by different firms; (c) the role of travel intermediaries - specialised organizations that operate between the producer and tourist - who can influence if not determine which services should be offered, location, when, and what price, and (d) tourism demand is highly elastic, seasonal in nature, and prone to subjective factors such as taste and fashion as well as the more objective factors of demand such as price. In general, the tourism industry has four main characteristics, i.e. inflexibility of supply, perishability, fixed location, seasonality, and relatively large financial investment.

5.5 Marketing Strategies

Through a sound marketing approach, the international tourism demand for a specific country can be created or stimulated for a realization of tourism potential. Tourism marketing depends on a well-planned program involving the marketing mix for the product of "travel". Meidan (1989) suggested that the first step in planning a tourism marketing strategy is to confirm corporate or organizational objectives relevant to tourism growth and profitability. As shown in Figure 5-4, the formulation of marketing objectives is a function of the SWOT analysis, i.e.

examination of environmental threats and opportunities as well as strengths and weaknesses in the organization [Meidan, 1989:526].

Figure 5-4
Tourism Marketing Strategy



Source: Adapted from Meidan in Witt and Moutinho (1989:526)

Culpan (1987:545-547) identified the following strategies: (a) promotion of individual tourism focusing on an individual tourist, promotion becomes the key to

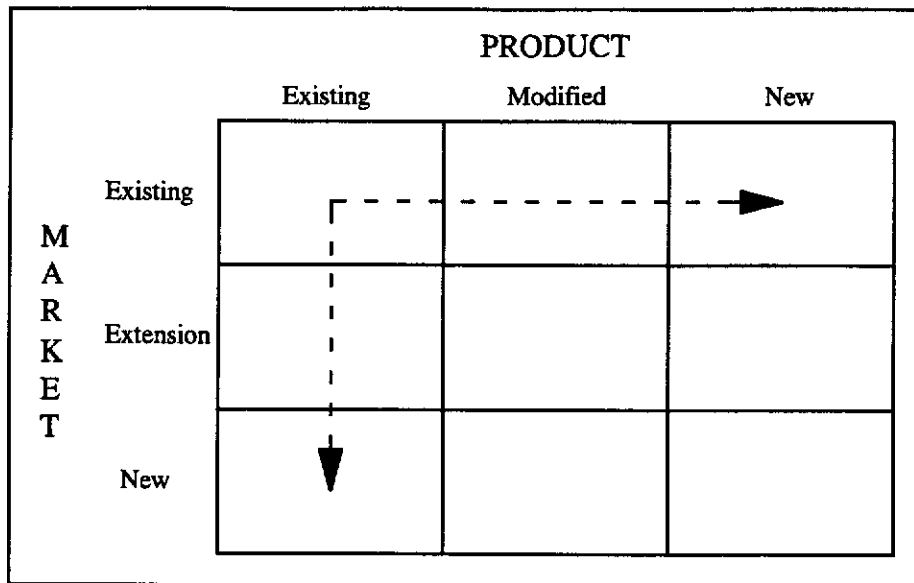
marketing and must be supported by government agencies such as tourism bureaus and information centers, or by both government and private travel agencies. Countries that capitalized on this strategy include Turkey and New Zealand; (b) promotion of mass tourism - local and international travel agencies and tour operators play a critical role. The Caribbean Islands were developed to cater for the needs of tourists of all kinds. The beaches played a significant role, and (c) focus strategy promoting development of a market segmentation strategy focusing on such tourism categories as yacht, youth, adult, religion, health or sports. One of the most effective approaches is to divide the present and potential market on the basis of demographic, psychographic, or geographic criteria and concentrate marketing mix efforts on serving the selected market. The tourism marketer must consider target marketing to a more precise audience: those most likely to be interested in and able to actually purchase a trip to the tourist destination [Burke and Resnik, 1991]. Ahmed and Krohn (1992:91-92) indicated,

Differentiating markets ... becomes an important means by which tourism marketers can focus on those potential consumers most likely to be interested, and perhaps equally important, direct available marketing efforts to those activities most likely to influence the target audiences.

Meidan (1989:527) puts forward three major strategies for tourism: (a) market penetration strategy focusing on gaining market share at the expense of competitors through creating a differential advantage via any of the elements of the marketing mix. This is undoubtedly the most popular strategy prevalent amongst tourist firms which would also, if well-planned, win new tourists through its better understanding of their needs; (b) market extension strategy designed to reach new types of tourists by modifying the firm's present tourist products, and (c) market development strategy - according to this strategy the tourist firm will seek new classes of tourists for its products or will add salient product characteristics to the existing line. This strategy seeks to widen its appeal to attract tourists from segments of the market

which the firm in the past has not concentrated on. Such a strategy may either attempt to receive the new types of tourists in addition to its traditional ones or may resolve to replace its market segment appeal. Promotion and product development are the most appropriate marketing mix variables adopted with this strategy. Meidan (1989:527) further forwards three types of market development strategy. These are: (a) the tourist product differentiation strategy which is designed to differentiate each tourist sub-product in real or psychological terms. A differentiated marketing strategy should be applied with different marketing mixes designed to satisfy several market segments. This strategy prompts increased promotional expenditures as unique promotional mixes are developed for each market segment; (b) the reformulation strategy which includes specific tourist programs which are designed to ameliorate some attributes of the tourist products, in order to satisfy the needs of the present tourist market. According to this strategy the tourist firm sets out to build upon its present market through developing new products. This strategy may help to define the particular range of tourist products which would match with the specific motivations of the target tourist market, and (c) the innovatory strategy which focuses on expanding the tourism target markets either by segmenting the broader market or converting non-touristic. It means that the tourist organization will seek to satisfy new tourists with new tourist products and services. The appropriate strategy may take the model developed in Figure 5-5.

**Figure 5-5
Tourism Marketing Strategy - Product/Market Maxtrix**



According to Figure 5-5, a tourist destination may concentrate on one product but diversify its markets or it may sell the existing product, modified product or new product to existing market. Whichever way is chosen depends on the overall tourism policy in the country. Tourism marketing should not be considered as the task of only one or two departments of a government. It calls for a coordinated approach to ensure its success. For example, in Canada all levels of the government have undertaken co-operative marketing activities with the private sector domestically and internationally, with the following respective roles: (a) at federal government level - national image and general awareness advertising; (b) at provincial and territorial government levels - destination-specific and attraction-specific promotion within their own jurisdiction with a focus on fostering a favourable overall image of the province or territory concerned, and (c) at private sector level - price-specific and product-specific promotions. The provincial and territorial governments and the private sector have distinct promotions in target markets, both in Canada and abroad, for their specific tourist destinations. Federal marketing has concentrated on the national perspective. And most federal, provincial and territorial tourism marketing

activities undertaken in co-operation with the private sector are in the areas of travel product creation and promotions.

Pritchard (1982:56) reiterated that the hospitality industry's shared interest in tourism development has given rise to close and cooperative relationships between government and industry representatives in many states in the United States. He mentioned that in Pennsylvania alone there were 59 locally organized tourism-promotion agencies composed of individual operators. Accordingly, these agencies work with the state, offering advice in charting the general direction of the state's tourism-promotion campaign and supporting some promotions through a matching-funds arrangement [Pritchard, 1982:56].

The major obstacle to developing a tourism marketing strategy in centrally-planned economies is the necessity for political change. Buckley and Witt (1990:16) ascertain that tourists require freedom of access and movement in order for the tourist industry to flourish. Attitudes in centrally-planned economies vary from severe restrictions (Albania) through limited access to certain areas and escorted tours only to almost complete freedom (former Yugoslavia). As Buckley and Witt (1990:117) further explained, added to these problems are: (a) the non-convertibility and non-availability of currency; (b) often low quality of tourist facilities; (c) lack of training for staff at all levels - managerial, supervisory and operational, (d) poor marketing, information, and promotion. As suggested by Buckley and Witt (1990:17-18), short term strategies for increasing international tourist flows include improved marketing and promotion of the attractions. Long term strategies depend on improvements in the environment for tourists, including freedom of movement and exchange problems, and upgrading the quality of tourist products such as accommodation, catering, entertainment, and amenities. Andronicou (1986:128) indicated that countries have various marketing strategies depending on their local needs. In Cyprus, for example, the emphasis was on conference, incentive, and

special forms of tourism (such as archaeology, mountain trekking). These were applied to relieve the over-developed regions and focused on higher and middle-income tourists. As Papadopoulos (1989:33) indicated, the tourist market is fragmented in that it consists of many businesses for various domestic and foreign industries providing goods and services to, and for, tourists.

Papson (1979:250) indicated that tourism marketing is financed not only by the private sector but also by all levels of the government. As Ryan (1991:105) put it, the marketing of tourism requires: (a) enhancing visitor satisfaction which may involve recognition that social carrying capacities are less than the physical carrying capacities; (b) accepting that a growth in visitor numbers may sometimes be inconsistent with the objectives of maintaining environments and tourist attractions; (c) more careful marketing of an attraction in the sense of marketing tourist zone with types of tourists and their needs; (d) establishing alternative criteria of success so that mere numbers of tourists are not seen as the goal of tourism marketing, but rather the achievement of high rates of satisfaction, and (e) considering both residents as well as tourists as consumers of tourism. It might be argued that tourism has suffered from an unbalanced marketing strategy on the part of many in the industry. Ryan (1991:109) suggested solutions for such view points: (a) identifying types of tourist developments that are consistent with the physical carrying capacities of the area; (b) identifying market segments that will be interested in the type of tourism product being envisaged; (c) accepting the physical and social constraints that arise; (d) using pricing policies as part of the market segmentation and relating to profitability; (e) continually monitoring host reaction to tourists; (f) maintaining the objective sustaining the satisfaction levels of the target group of tourists; (g) developing promotional material that correctly reflects the tourist zone; (h) developing products that have unique selling points and aiming at segmented markets to avoid the problems that accompany exceeding the company capacities of vulnerable locations, and (i) recognising that limiting the growth of physical

accommodation processes and advantages not only for the social and physical environment, but for profitability and costs.

Hawkins and Ritchie (1991:57) predicted that during the 1990s, pressures on destination and operator marketing strategies will increase due to intensification of competition at all levels as well as due to tourists becoming more demanding and knowledgeable. As a result, marketing will have to be more aggressive and precisely targeted. For this reason marketing and promotion budgets in the 1990s will increase faster than tourism growth for the same period.

For example, Moffet (1992:33) reported that the extra funding to the tune of \$10 million to the Australian Tourism Commission in 1992-93 would be "directed towards encouraging more high-yield tourists to Australia so as to create more jobs". Meidan (1989:527) explained that more recent studies on tourism marketing strategies indicate that strategy selection should be based on four factors, viz.; (a) the size of the segment or sub-market; (b) tourists' sensitivity to the differences between tourist hotels, airlines, travel agencies, etc; (c) the distinctiveness of these tourist establishments and companies, and (d) competitors' marketing strategies.

According to Meidan (1989:527) a tourism marketing strategy should have the following characteristics: (a) it should have a long-term time horizon, i.e. a strategy should relate to expected and/or possible developments in the market place, technological developments, trends and competitors' policies; (b) it should be decided at the top echelons of organizational decision makers and should involve all the functional areas and activities, not just marketing management; (c) the expected level of risk of any selected strategy should be considered; (d) it should fully attempt to exploit national and international opportunities; (e) it should be compatible with existent resources, strengths and opportunities, and (f) it should be translated into

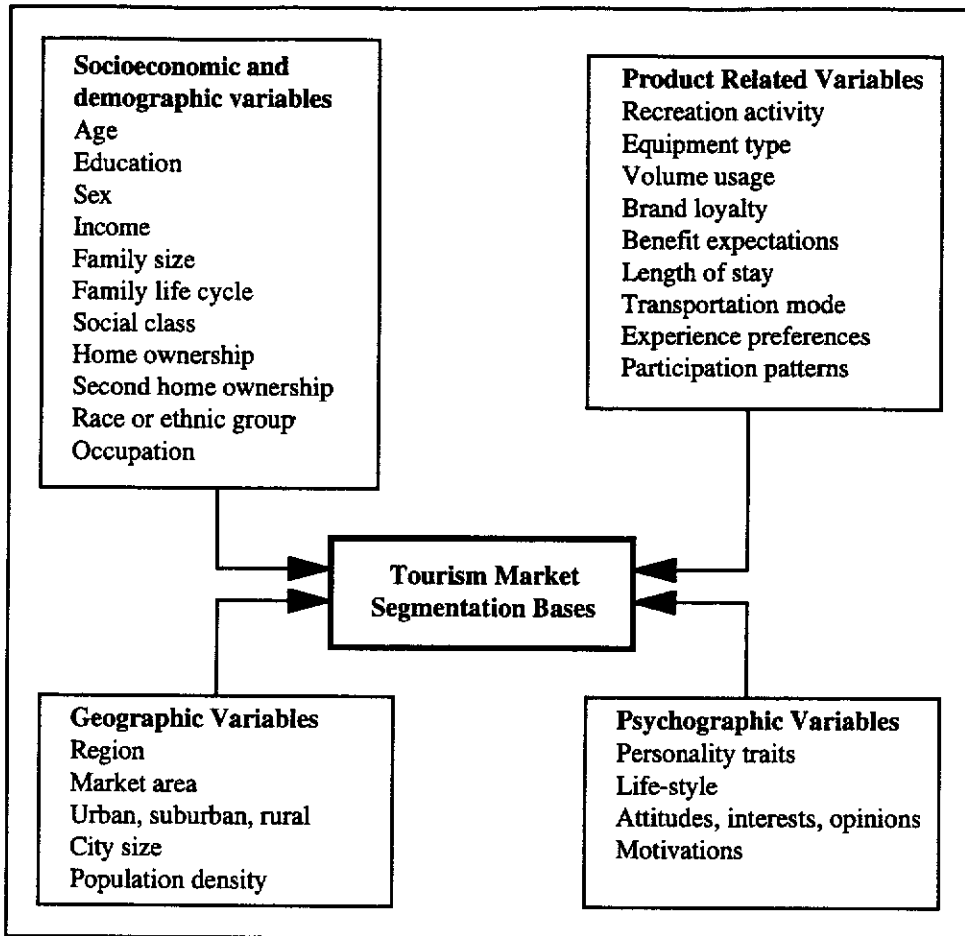
plans, i.e. a strategic tourism plan in writing has to be developed as a result of a strategy, if it is to be implemented.

5.6 Market Segmentation

The concept of market segmentation is the basic point of origin for all tourism marketing strategies. [Witt and Moutinho, 1989:260]. Market segmentation is a fundamental prerequisite for effective marketing. Destination image analysis to obtain varying perceptions of the tourist destination held by tourists from different market places should be considered [Chon, Weaver and Kim, 1991:32]. Markets can be segmented in many different ways. Destinations may be made to cater for groups of holiday makers according to their age, their social class, or their regional distribution [Holloway and Plant, 1988:99]. Mill and Morrison (1985:361) showed that segmentation is based on four assumptions. These are: (a) the market for a product or service is made up of particular segments the members of which have distinctive needs and preferences relative to the product or service being marketed; (b) these potential tourists can be grouped into segments the members of which each have similar and identifiable characteristics; (c) a single product offering will appeal to some segments of the market more than others, and (d) firms and organizations can improve their overall marketing effort by developing specific product offerings to reach specific segments of the market.

Mill and Morrison (1985:363) segmented tourism market into socio economic and demographic, product-related, psychographic, and geographic variables. Each of these variables in turn can be broken down into several components as in Figure 5-6.

Figure 5-6
Tourism Market Segmentation Base



Source: Adapted from Mill and Morrison, 1985:363

Such segmentation strategy is important in that it forces the country to focus its capabilities on most advantageous segments.

5.7 Developing the Promotional Plans

The aim of promotional activities is to create demand for a product or service. Promotion includes advertising, personal selling, public relations, publicity, and sales promotion activities. To sell the product it is necessary to (a) attract attention, (b) create interest, (c) create a desire, (d) get action, and (e) convince the customer to repeat the purchase/consumption [McIntosh and Goeldner, 1990:400; Mill, 1990:288]. According to Mill (1990:286) steps that are taken in the development of

a promotional plan include: (a) Selection of the target audiences; (b) Determination of objectives; (c) Development of an appropriate message; (d) Selection of the promotional mix; (e) Setting a budget, and (f) Evaluation of the campaign.

The target audience is the tourist as well as the intermediaries operating in the channels of distribution between the producer and the tourist and the objectives of promotion are to inform, to persuade, and/or to remind the target audience. They must: (a) get the tourist's attention; (b) develop an understanding about the benefits being offered; (c) create positive attitudes about what is being sold; (d) get the tourist to buy , and (e) convince the tourist to return [Mill, 1990:288]. The message must focus on the positive images the destination has compared with the competitor. The promotional mix can be varied. But the most widely used method in travel and tourism is advertising - both to the consumer and the trade.

5.7.1 Promoting Image

Metelka (1990:77) defined image as, "Mental picture or set of expectations about a person, place, or activity that exists (voluntarily or through suggestion) before the actual experience". Hunt (1975:1) wrote,

The perception held by potential visitors about an area may have significant influences upon the viability of that area as a tourist-recreation region. What the potential customers think about the natural environment, climate, and people of a region may shape perceptions or images which detract from or contribute to successful development.

The inability of tourist destinations to live up to the images promoted of them by tour operators can mean a decline in tourism which forces governments to engage in expensive foreign promotional campaigns. Um and Crompton (1990:433) contend that the image and attitude dimensions of a place as a travel destination are likely to be critical elements in the destination choice process, irrespective of whether or not

they are true representations of what that place has to offer. Competition with other locations for tourism can mean that governments have little control over the image they wish to promote. [Millman and Hutchinson, 1988:24]. Glazenberg (1991:29) indicated that tourism promoters in Northern Ireland take a focused approach in their advertising efforts rather than relying on a general approach.

Ahmed (1991:25-26) indicated that because of the intensity of competition among destinations, destination marketers go to great lengths to establish positive images for the location. Once a negative image is established in the minds of potential travellers, even a full range of marketing activities cannot entirely reverse it. Advertising, sales promotion, pricing, and packaging of tourism services can, however, alleviate some negative images as a destination's image influences a tourist's decision-making process. The overall focus of negative image correction should be to identify and change the beliefs of a target market with respect to the destination being considered. The role of the destination image in tourism has a greater significance in marketing when viewed through the framework of the travellers' buying behavior which go through (a) need recognition, (b) information search, (c) evaluation of alternatives, (d) choice of product or service, and (e) post-purchase evaluation. [Chon, 1991:68]. Ahmed (1991:26) indicated that negative images could be corrected by: (a) capitalizing on positive images of component parts; (b) scheduling mega-events; (c) conducting familiarization tours; (d) using selective promotion; (e) bidding to host international travel and tourism conventions, and (f) taking advantage of a negative image.

However, said Ahmed, (1991:27), "the best destination marketing strategy is to have and maintain a positive image in the first place". Negative images of destinations frequently limit growth in the international tourism market. Bad press, lack of knowledge about the destination, and political instability deter many tourists from choosing some countries for their travels. For instance, a recent murder of a British

tourist in New Orleans, in the United States, was very negative publicity for the United States in general and for New Orleans in particular [Bodwitch, 1993]. Structural and organizational changes also have a positive effect on marketing tourism overseas. For example, as Maguire and Uysal, (1988:12) indicated, in the People's Republic of China, the traditional monopolization of foreign tourism by the government organ was changed in 1987 with the following improvements: (1) simplification of entry and exit procedures, (2) permission to foreign investors to reside in China, and (3) relaxation of restrictions on travel.

According to Ferguson (1991:19) the primary role of governments is to promote tourism overseas and within their countries through their national tourism organizations who should define: (a) their priority markets; (b) target groups in the selected markets, and (c) project the messages decided such as print advertising, television, etc. Getz (1991:158) maintained that images of a destination change with new information, particularly news of disasters and other bad publicity, and also in response to first-hand reports of friends and relatives. He suggested that large destination areas should concentrate on using festivals and events to accomplish three limited, but important objectives: (a) promote the large destination as an area that has an attractive variety of things to do, or develop broad themes such as friendliness, cultural diversity, or excitement; events can be used to create the pertinent imagery; (b) use mega-events to attract media attention to the destination as a whole, and take long-term advantage of the so-called halo effect that sometimes results when successful events generate a lasting impression of a desirable place to visit, and (c) create or attract so many smaller events that the destination as a whole becomes known as a lively area with something attractive for all interests [Getz, 1991:157]. Kale and Weir (1986:6) highlighted that a study of the perceptions of U.S. students to India as a tourist destination suggested that developing countries need to examine the needs of tourists and develop a better promotional program to make potential tourists aware of all that they have to offer.

5.8 Roles of Governments

Governments in both developed and developing countries are expected to undertake an entrepreneurial role to ensure that "pioneer" activities are initiated [Jenkins and Henry, 1982:501]. Jenkins and Henry classified the government's role into active and passive participation. According to their interpretation, active involvement is a deliberate action by the government to favor tourism sector. Such an involvement includes managerial as well as developmental involvement. On the other hand, passive involvement occurs where government undertakes an action which may have implications for tourism, but is not specifically intended to favor or influence tourism. Categories of such action include mandatory and supportive actions. Examples are legislations relating to employment of foreign nationals as well as establishment of national tourist boards [Jenkins and Henry, 1982:501, 502].

Gamble (1989:6) wrote,

The governments of African countries have often taken the initiative in developing a tourist industry. Their role can either be passive or active. A passive role means creating suitable conditions to attract investment. This entails laws to ease the transfer of money in and out of the country, providing tax incentives for investors, restricting the rights of trade unions, speeding up the processes of planning, land purchase and import licences, and trying to ensure political stability.

During the early stages of the development of resorts, governments often find it difficult to attract direct foreign investment. Also, some governments do not want to encourage foreign investment for both ideological and practical reasons. Such investments can give foreigners too much influence over the domestic economy, and loans have to be repaid and profits sent out of the country. These situations might lead the government to take a more active role, using the country's own money to build tourist facilities.

McIntosh et al (1984:234) suggested that on the macro level, the government: (a) establishes an overall development plan based on social, environmental, and

economic goals; (b) encourages a private-sector business climate that helps and promotes private-sector investment according to the overall development plan; (c) provides all those planned supply components which are not provided by private-sector firms. The New South Wales government, for instance, has since 1988 assumed a facilitator role in accelerating and directing development, particularly through planning, infrastructure, and land provision and tax incentives [West, 1990:1]. Whether a nation should develop a tourism industry and thereby develop a marketing strategy depends on numerous factors. The nations as well as tourism industry leaders must evaluate: (1) national interests, (2) the national needs tourism could fulfil, (3) the relationship of the benefits of tourism to the costs of a tourism program.

Peterson (1990:56) indicated that to be successful, a country's government, its travel industry, and those outside the industry must place strong emphasis on the demand and supply of tourism services as part of the nation's overall economic development strategy. On the demand side, it is necessary to first research the potential interests and motivations of tourists, locate and identify prospective markets, develop pricing techniques and position marketing and promotional campaigns to attract consumers from those markets. On the supply side of tourism, there are several factors which must be addressed. These include the economic, social and political environment of the country. Included also are natural resources, utilities, transportation, communication, infrastructure, etc. [Peterson, 1990:56].

5.9 Country Cases

Ingram and Durst (1989:12) reiterated that in the international market for tourists, most countries attempt to sell a package of activities that will provide the most satisfactory experience for their visitors. Ashworth and Goodall (1990:1) indicated, "places have been promoted by means of the projection of favorable images to a potential market of users by those who have interest in attracting them". Tourism to

Africa, for example, is heavily dependent on long-haul traffic which is made possible by the development of speedy air transportation and inclusive tours. Gamble (1989:13) indicated that in Africa tourism is by far the most extensive service industry which earns foreign exchange. The marketing of tourism is already established and available through a network of tourist companies (the 'wholesalers') and travel agents. According to Teye (1988b:224) since tourism in Sub-Saharan African countries is hardly an industry and since the tourism infrastructure is weak, tourism organization is poor, and net revenue is meagre, regional co-operation will therefore not only improve the flow of tourists from the main generating countries outside Africa, but it should also facilitate the expansion of intra-African tourism. Nyaruwata (1986:56) reiterated,

Tourism marketing for the majority of developing countries is a constant uphill struggle. This situation is more critical for African countries. This is due to the fact that besides the general adverse factors which are common to other developing countries the image of Africa overseas leaves a lot to be desired.

Nyaruwata (1986:59, 60) noted that before the African national tourist organizations begin marketing their countries overseas they have to be certain that the products they are offering are competitive in the international market. Nyaruwata (1986) further lamented that European tour operators are not very keen on promoting African destinations due to the general negative image of the African continent within the European markets. The Australian wholesale tour operator survey [Frost and Shanka, 1992] revealed that only 3.9 per cent of their business was in Africa whereas 35.3 per cent of the business was done in Asia. Table 5-1 shows that while Asia accounts for 35.3 per cent of the tour wholesalers' business, Africa is left behind with the Middle East.

Table 5-1
Volume of Business of Australian Tour Wholesalers

Region	Percent
Asia	35.3
Europe	27.5
America	13.7
Australia (domestic)	9.8
Pacific Rim	5.9
Middle East	3.9
Africa	3.9

Ankomah and Crompton (1990:15) identified inhibitors of tourism development in Sub-Saharan Africa as negative images, foreign exchange constraints, lack of skilled manpower, weak institutional frameworks for tourism planning, and political instability. Moreover, as Forrester (1992:38) reported there are views that air fares are too high and routes between Africa and Europe are not very profitable. Furthermore, African governments are ill-advised to formulate a policy of restricting access to European carriers in order to protect their own air-lines.

As Teye (1988a:330) reported, tourism development in the continent has been limited due to the continent's poor image perceived by major tourist generating countries of Europe and North America. According to Sithole (1991:46) Zimbabwe's tourism promotional program focuses on marketing strategy that would market Zimbabwe locally, in the Southern African region, and overseas. On the overseas market, the program is to target the markets that constitute key sources of tourists. In Kenya, for example, the Ministry of Tourism and Wildlife has introduced marketing policy that will focus on: (1) diversification of markets - both geographic as well as type of tourism, (2) new markets such as Japan and the Far East, Australia and South Africa. [Economist Intelligence Unit, 1991:63]. Forrester (1992:38) indicated that the Kenyan government is diversifying tourism from traditional beaches and safari packages into the more important field of water sports, golf, incentive travel and cruise ship tourism.

As the Economist Intelligence Unit (1991:69, 70) reported, Mauritius has been promoted as a high-class tourist destination, and marketing and promotion campaigns have been targeted at a select few and for the foreseeable future focuses on high spenders from Europe and Japan. Vallen and Levinson (1989:75) wrote that the bottlenecks in Leningrad and Moscow switched the marketing's strategy to other destinations, which in turn required political ramifications to ease entrance to and exits from these attractions. On the other hand, Carroll et al (1991:28-29) showed that governments at all levels in Australia have been directly involved in tourism marketing and promotion with at least \$310 million spent on tourism marketing in 1986-87.

5.10 Tourism Marketing in Ethiopia

Ethiopia, with its rich variety of attractions such as historical sites, diverse culture, scenic beauty, unique animal and bird life, may be dubbed as one of the world's most attractive destinations. For lovers of nature and history, Ethiopia is undoubtedly a most interesting destination in the Horn of Africa. Its natural attractions together with numerous national parks, wildlife, historical sites and ethnic diversity also have significant contribution towards tourism development. The cultural attractions of the country which include its historical towns like Axum, Lalibela and Gondar; buildings and monuments; monasteries, archaeological findings and paintings have been the major attractions for tourists. Scenic attractions, on the other hand, are mainly in the central, southern, and south-western parts of the country. These are among the most beautiful in Africa. With thermal fountains, rift valley lakes, volcanic scenery and, large savannahs. These attractions are also home for animals and birds endemic to Ethiopia. As Tourconsult (1990:179) indicated the existence of Ethiopia's abundant and widely unspoilt wildlife can mainly be attributed to its varied landscape ranging from the highest mountains to the deepest valleys. Addis Ababa's weekend area (a 200 km radius) offers numerous highlights of culture, scenery and wildlife. Especially numerous tourist attractions are offered by Ethiopia

south of the Addis Ababa weekend area down to the borders of Kenya. This vast area, however, has not yet been successfully developed and marketed internationally [Tourconsult, 1990:182].

Moreover, shortcomings are manifested in the following areas: poor tourist infrastructure, the country's minimal presence in the catalogues of Western tour operators, high charges for safaris etc [Ethiopian Tourism Commission,1991]. Another major area of attention is the realization of conference tourism, particularly those sponsored by the United Nations Economic Commission for Africa (ECA), and the Organization of African Unity (OAU). Data on this tourism type shows a significant growth to date. According to the Ethiopian Review (1992:8) the decision of the Organization of African Unity (OAU) to build a \$29 million conference center in Addis Ababa is particularly a great opportunity for the country's tourism growth. As Table 5-5 shows, although the size is not impressive there is a great potential for this type of tourism to grow.

Table 5-2
Number of Conferences and Participants

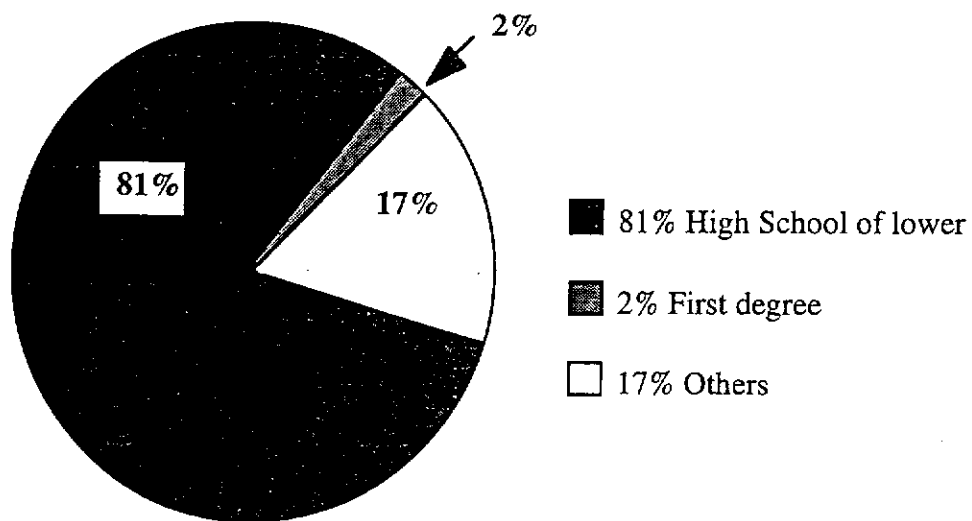
Year	ECA Sponsored		Non-ECA Sponsored		Total		Percentage Change	
	Conferences	Participants	Conferences	Participants	Conferences	Participants	Conferences	Participants
1985	64	3940	7	895	71	4835	-	-
1986	37	2191	22	2605	59	4796	-16.9	-0.8
1987	66	3960	27	2960	93	6920	57.2	44.3
1988	80	3728	20	2370	100	6098	7.5	-11.9
1989	56	3300	11	1475	67	4775	-33.0	-21.7
1990	32	1749	50	4375	82	6124	22.4	28.2
1991	49	4147	26	1705	75	5852	-8.5	-4.4
Total	384	23015	163	16385	547	39480	4.1 weighted	4.8 average

Source: Ethiopian Tourism Commission Tourism Statistics 1992

Institutional strength and professionalism of employees is essential for the efficient development of tourism. Because the private sector is non-existent, tourism development is primarily dependent on a number of government departments which

come under various ministries. For example, the Wildlife Conservation Organization is under the Ministry of Agriculture, Museums come under the Ministry of Culture; Handicrafts and Small Scale Industries come under the Ministry of Industry; hotels, travel agencies, tour operations, duty free and gift shops come under the Ethiopian Tourism Commission. Traditionally, the hotel, catering and tourism industry in Ethiopia has suffered from a poor image. This perception seems to be linked to a cultural environment where it is the practice to have help at home and where jobs associated with services within the hotel and catering industry have, subsequently, come to be regarded as servile. [World Tourism Organization, 1989:4]. Elliott (1991:7) ascertained that tourism is widely thought to be a low-paying, low value-added industry employing low-skilled workers [Figure 5-7].

Figure 5-7
Professional Competency as Percentage of Total
1987/88



As can be seen in Figure 5-7, of the 6,541 persons employed in the tourism industry, only 133 or 2.0 per cent were holders of first degrees or above. 5,303 (81.1 per cent) were with high-school or lower education. Such poor conditions were noted by Pollock and Ritchie (1990:584) who said that although the need for a professional approach to the operation and management of tourism organizations has now been

been matched by the creation or provision of education and training infrastructure capable of satisfying the desires and aspirations of the industry and its members. This was due to lack of adequate funding and a framework to provide both a vision and a direction for the design and development of the necessary education and training programs. Sheldon (1989:502) emphasized that as personnel are the backbone of the tourism/hospitality industry, their development is critical to the professionalism of the industry and to the satisfaction of the employees themselves. Hobson et al (1984:5) indicated,

Management hasn't helped, either, by failing to recognize the instrumental role played by employee interpersonal skills in providing high quality service. Until positive interpersonal skills among service delivery personnel become a focal issue for top management, one cannot expect a great deal of concern on the part of individual employees for the quality of their interpersonal image.

Blanton (1981:117-118) wrote,

Tourism training in developing countries has almost exclusively centered on vocational and technical skills. Little thought has been given as to how this education relates to the existing social and cultural framework of the host country, to the problems of communication between guest and host, or to the demands and stresses placed upon those in the front lines of the industry, whose potential for "culture shock" far exceeds that of their foreign guests.

5.11 Competing Countries

Although other countries in the Eastern African region may be regarded as competitors, the most immediate neighbors - Kenya and Tanzania - are the most serious competitors. They enjoy a relatively well developed tourist infrastructure and a very high degree of awareness on the part of the tourists. [Desta,1991]. Table 5-3 shows that while Kenya, Zimbabwe and Tanzania enjoy a healthy growth in tourist arrivals, Ethiopia's record shows a very poor performance.

Table 5-3
Tourist Arrivals and Receipts in Some African Countries

	Arrivals ('000)			Receipts (US\$m)		
	1986	1987	1988	1986	1987	1988
Kenya	604	662	677	313	344	410
Zimbabwe	357	372	449	29	32	24
Zambia	123	121	108	7	6	5
Tanzania	103	139	188	25	33	31
Burundi	66	80	99	1	1	1
Malawi	69	76	83	8	6	6
Ethiopia	59	60	62	5	7	4
Uganda	32	37	40	3	2	4

Source: United Nations 1987 Statistical Yearbook p 750

This poor performance is mainly due to the political situation and the country's negative image outside. The number of international arrivals to Ethiopia showed a 25 per cent increase in 1987 over 1986. However, business, holiday and transit arrivals showed a negative growth while conference tourism and Visiting Friends and Relatives (VFR) showed a significant increase [Ethiopian Tourism Commission, 1991].

Compared with the 1986 monthly rate of arrivals, of the 91,296 visitors to Ethiopia in 1987, the biggest arrival was recorded in December 1987 and the least was in January 1987. July registered significantly higher both in the rate of arrivals and receipts, 10.9 per cent and 33.4 per cent, respectively. January recorded the lowest arrival (5.7 per cent) while February was recorded as the lowest month for receipts (3.2 per cent).

5.12 Promotional Strategy

As early as the 1960s Arthur D. Little (1969) warned the Ethiopian government that no tourism development program can be successful without the support of an effective promotional strategy for which 1 per cent of tourism receipts may be applied as a general guideline. Since the 1960s Ethiopia had been using an ambiguous tourism strategy. According to the Ethiopian Tourism Commission (1991) study there were several reasons for this: (a) there was national policy; (b) whatever strategy was developed between the Tourism Organization and the Ethiopian Air Lines, it focused only on the Historic Routes between Addis Ababa and Asmara; (c) the first rudimentary tourism policy was introduced in 1980 after the restructuring of the Institution. However, this policy failed to indicate the promotional strategy, and (d) the 1980 policy created more obstacles by requiring that tourists should only move about in the country on guided tours, that the government-owned and operated tour operators be the sole operators and travel agents in the country, that tourists, besides being required to have valid travel documents, are also required to obtain special permits to move about within the country. All these factors have drawbacks for the smooth development of tourism in the country. Tourism development depends on continued economic growth and 'the willingness of governments to open their countries to foreigners....' [Mak and White,1992:14].

5.12.1 Short and Mid-Term Promotional Strategy

The Ethiopian Tourism Commission (1991:14) paper suggested the following circuits should be focused for promotions and marketing:

(a) Addis Ababa and environs (220 km radius); (b) The Rift Valley region: Northern (Langano, Shala, Abiyata, Awassa); Southern (Abaya, Chamo, Nechisar); (c) The Southwest (Omo) region: North Omo (Keffa, Mizan Teferi, Bonga, Jimma, Yeka); South Omo (Jinka, Mago and Omo National Parks, Chew Bahir, Omo River); (d)

The Bale - Borena - Sidamo Region, and (e) The Harergie Region. These circuits have the widest national parks and controlled hunting areas. They are rich in natural scenery, wildlife and birds, thermal springs, archaeological sites and diverse and untouched culture. Although focus must be made on the unspoilt nature and culture it requires enormous investment and long term commitment to bring these areas to levels of international standard.

5.12.2 Long Term Strategy

Although the Commission's paper focuses on water tourism and other tourist attractions to be developed mainly on the Red Sea, recent political developments in this area annulled this strategy. Besides, there are many countries that are well known for water-sports tourism [Forrester, 1992:38]. Countries like Kenya and Zimbabwe developed a long-term strategy to curb declines in tourist arrivals due to competition. Kenya, for example, is seeking to diversify tourism from traditional beach and safari packages into the more up-market field of water sports, golf, incentive travel and cruise-ship tourism, linking a flight and a cruise with a week's safari [Forrester, 1992:38]. Zimbabwe, on the other hand, to counter competition from South Africa, Botswana, and Zambia is pressing for regional co-operation to produce what it calls a "Southern African tourist product", which could compete on international markets while at the same time boosting regional cross-border tourism. [Rusinga, 1992:42].

5.13 Obstacles

The Ethiopian Tourism Commission Paper (1991:10) revealed that the major obstacles to develop efficient promotional strategy include: (a) unavailability of detailed listing of tourist products; (b) very low promotion budget and unavailability of foreign exchange, and (c) natural and man-made disasters in the country which have led to a negative image of the country. The 1992 Wholesale Tour Operators Survey revealed that only 1.8 per cent of respondents indicated they received

promotional material from the Ethiopian Tourism Commission. Provided political stability is achieved they would sell Ethiopia with Kenya and Egypt. In order to "sell" Ethiopia as a tourist destination, 92.5 per cent would like to receive general information about the country; 75.0 per cent require brochures, posters, displays, pictures, flyers, literature, etc.; 52.5 per cent require videos, slides, TV ads, etc. To this, Levine (1989:45-46) forwards a ten-point check list of the entire marketing program: (a) do you really know your product?; (b) do you know exactly what are your present and potential markets?; (c) does your area have a U. S. P. (unique selling proposition) and can it back it up?; (d) does the program have clear and measurable goals?; (e) is the marketing program fully funded?; (f) has tourism been sold at home first?; (g) does the program have a full kit of marketing tools? - purchased advertising space or time - booklets and folders - video cassettes - editorial placement and publicity - exhibits and displays; (h) is everybody marching under the same banner?, and (i) is an emphasis in the marketing program repeat, longer stay or non-season business? Levine (1989:46) summed up the significance of the ten step self assessment kit, ... if one knows one's product and one's markets, if one has developed a U. S. P., if the goals have been quantified, if all the money sources are tapped, if the marketing program being at home, if one is using a full kit of marketing tools, if one has enlisted everybody ... on the tourism team, if one is pushing repeat, out-of-season and a longer stay business, and if the supporters really have made an over three-year commitment to the marketing program and budget, the program might just be a perfect ten!

5.14 Market Research

Promotional activities must be preceded by the identification of markets and attractions. The country's traditional markets include Western European countries such as Italy, Germany and the United States as shown in Table 5-4

Table 5-4
International Arrivals by Region (1986-1991)

	1986	1987	1988	1989	1990	1991
Africa	16840	20283	21885	25684	24073	24777
Europe	18904	20464	22057	20437	21069	21582
Americ	3516	4640	5470	4940	8144	8352
Middle East	5376	5105	5523	5335	7504	7746
Asia	5107	6309	7638	8661	7394	7590
Unspecified	8784	16343	13877	11784	11162	11534

Source: Ethiopian Tourism Commission Tourism Statistics 1992

The U.S. market was very strong before the 1974 Revolution. This market could be developed again with proper promotional campaigns through travel agents in the U.S. It must be noted that the tourists coming from the U.S. mainly focussed on the historic routes. However, it requires a great effort to improve the conditions along this Route since many of the sites have been damaged and closed down as a result of the civil war. Italian, German, French and British markets also require closer understanding through market research. In addition to these traditional markets the Middle Eastern markets also need identification, particularly those a seeking cool and pleasant climate.

Japan has not been on the shopping list for Ethiopia but with their fervent desire to travel, the Japanese may be good potential market. In fact, given the means and the opportunity, the Japanese exhibit a marked preference for travel. They are attracted by the opportunity to experience what they see as a natural and unexploited environment, and images of the natural environment dominate their perceptions of a tourist destination [Perth Times, 1992:E3]. The Japanese government, in its part, is actively encouraging its citizens to take more overseas trips [Morris, 1988:32, 33].

5.15 Conclusion

In general, Ethiopian Tourism marketing needs detailed market research to appraise the amount, nature, distribution, and characteristics of tourists. It is no longer enough to distribute here and there beautiful posters and illustrated brochures. It

goes deeper than this. Identification of the target markets and effectively promoting the country is paramount to the development of tourism in Ethiopia.

CHAPTER 6

SUB-SAHARAN AFRICAN COUNTRIES AND TOURISM DEVELOPMENT

6.1 Introduction

The importance of tourism to some African countries is very great. For example, Kenya "sees tourism as an important source of foreign currency and encourages private enterprise, including foreign investors" [Boniface and Cooper, 1987:133].

Gamble (1989:vi) wrote :

international tourism has a significant impact, economically, socially and spatially, on the more popular African destinations. Not only is more money brought into the country but opportunities and tensions are created through contact between the tourists and local people.

[Hubbard, 1990:36]wrote,

Africa south of the Sahara has a tiny share of the world tourism - 3.3 per cent in 1989. ... Of sub-Saharan Africa's total of 5.6 Mn arrivals in 1989, five countries - South Africa, Kenya, Zimbabwe, Botswana and Nigeria - accounted for 50 per cent. ... Europeans travel to Africa in relatively small numbers, but the market is very sensitive to changes in the local political situation. ... In the long term Africa has enormous potential, but poor infrastructure, impoverished economies and more pressing development priorities will ensure that in most cases progress during the 1990s will be slow

In Zimbabwe, for example, tourism arrivals grew 64.1 per cent between 1988 and 1992. Kenya registered a mere 0.4 per cent growth during the same period while South Africa's arrival grew by 259.2 per cent. Ethiopia's record shows only 9.2 per cent growth during the same period. Considerable growth rates were recorded by Benin, Lesotho, Botswana and Comoros. Overall, on the average, the 1992 arrivals increased by 63.2 per cent over 1988 arrivals. Table 6-1 shows the details.

Table 6-1
Tourist Arrivals in Sub-Saharan Africa ('000)

Country	1988	1989	1990	1991	1992	% Change 1992/88
Angola	39	40	46	46	40	2.6
Benin	75	75	248	401	433	477.3
Botswana	384	691	844	899	916	138.5
Burkina Faso	83	80	74	80	74	-10.8
Burundi	99	82	109	125	86	-13.1
Cameroon	100	87	100	71	62	-38.0
Cape Verde	NA	NA	NA	NA	NA	NA
Central A R	5	5	6	6	6	20.0
Chad	20	12	9	20	NA	0.0
Comoros	8	13	8	17	19	137.5
Congo	39	33	32	33	37	-5.1
Cote d'Ivoire	177	192	196	200	217	22.6
Djibouti	29	41	33	33	40	37.9
Equatorial G	NA	NA	NA	NA	NA	NA
Ethiopia	76	77	79	81	83	9.2
Gabon	20	113	108	128	NA	540.0
Gambia	102	86	101	114	NA	11.8
Ghana	114	125	146	172	NA	50.9
Kenya	695	735	814	817	698	0.4
Lesotho	165	216	242	357	417	152.7
Madagascar	35	39	53	35	54	54.3
Malawi	99	117	130	NA	NA	31.3
Mali	36	32	44	38	38	5.5
Mauritania	NA	NA	NA	NA	NA	NA
Mauritius	239	263	291	301	335	40.2
Namibia	NA	NA	NA	NA	NA	NA
Niger	33	23	21	16	NA	-51.5
Nigeria	306	161	226	308	272	-11.1
Reunion	NA	182	200	186	217	19.2
Senegal	256	259	246	233	245	-4.3
Seychelles	77	86	104	90	98	27.3
Sierra Leone	75	86	98	98	91	21.3
Somalia	40	40	46	46	20	-100.0
South Africa	805	930	1,029	1,709	2,892	259.2
Sudan	37	3	33	15	NA	-59.4
Swaziland	196	248	294	279	258	31.6
Tanzania	130	138	153	187	202	55.4
Togo	103	115	103	65	48	-53.4
Uganda	40	41	69	69	50	25.0
Zaire	39	51	55	33	22	-43.6
Zambia	108	113	141	171	159	47.2
Zimbabwe	449	474	606	664	737	64.1

Compiled from United Nations Statistical Yearbook 1994

Table 6-2 shows that Ethiopia's earnings from tourism increased 21.0 per cent between 1988 and 1992. Ghana, Chad and Tanzania showed considerable changes

over the period. Kenya only registered a 12.2 per cent growth between 1988 and 1992. Overall, the change between 1988 and 1992 is 41.7 per cent. This compares with the result from Table 6-1 with overall increase of 43.0 per cent increase over the period.

Table 6-2
Tourism Revenues in Sub-Saharan Africa (US\$ million)

Country	1988	1989	1990	1991	1992	% Change 1992/88
Angola	NA	NA	13	NA	NA	NA
Benin	40	20	28	29	32	-20.0
Botswana	38	54	65	79	65	71.0
Burkina Faso	5	6	8	8	9	80.0
Burundi	2	3	3	4	4	100.0
Cameroon	21	17	21	15	18	-14.3
Cape Verde	3	3	6	8	7	133.3
Central A R	5	3	3	3	3	-40.0
Chad	7	9	12	10	21	200.0
Comoros	3	3	2	9	8	166.7
Congo	6	7	8	9	6	0.0
Cote d'Ivoire	65	65	48	46	53	-18.5
Djibouti	5	5	6	6	5	0.0
Equatorial G	NA	1	1	2	2	100.0
Ethiopia	19	21	26	20	23	21.0
Gabon	7	4	3	4	5	-28.6
Gambia	43	43	46	55	56	30.2
Ghana	55	72	81	118	167	203.6
Kenya	394	420	466	432	442	12.2
Lesotho	12	13	17	18	19	58.3
Madagascar	20	28	40	27	39	95.0
Malawi	10	13	11	13	11	10.0
Mali	38	39	47	46	45	18.4
Mauritania	12	13	15	15	15	25.0
Mauritius	178	182	244	252	299	68.0
Namibia	NA	NA	61	76	91	49.2
Niger	11	14	17	16	17	54.5
Nigeria	53	21	25	39	29	-45.3
Reunion	NA	NA	NA	NA	NA	NA
Rwanda	7	10	10	4	2	-42.8
Sao Tome & P	1	1	2	2	2	100.0
Senegal	147	142	168	171	172	17.0
Seychelles	81	91	120	99	117	44.4
Sierra Leone	15	17	19	18	17	13.3
Somalia	NA	NA	NA	NA	NA	NA
South Africa	673	709	1,029	1,046	1,226	82.2
Sudan	29	45	21	8	5	-82.8
Swaziland	22	25	25	26	32	45.4

Table 6-2
Tourism Revenues in Sub-Saharan Africa (US\$ million) - (continued)

Country	1988	1989	1990	1991	1992	% Change 1992/88
Tanzania	40	60	65	95	120	200.0
Togo	36	50	58	49	39	8.3
Uganda	8	9	10	15	10	25.0
Zaire	7	6	7	7	7	0.0
Zambia	5	12	41	35	5	0.0
Zimbabwe	54	55	64	75	105	94.4

Compiled from United Nations Statistical Yearbook 1994

Tourist receipts contributed on the average 5.4 per cent and 7.1 per cent, respectively, in 1988 and 1992 to Sub-Saharan African countries' exports. Contribution to export earnings of Seychelles, The Gambia and Kenya were very significant in 1988 while Seychelles, Kenya and Tanzania topped the list in 1992. Ethiopia's share of tourism contribution to exports was 3.0 per cent and 5.1 per cent, respectively, in 1988 and 1992. Table 6-3 shows the details.

Table 6-3
Tourism's Contribution to Exports in Sub-Saharan Africa (1992)
(US\$ million)

Country	1988	1988	Receipts/ Exports	1992	1992	Receipts/ Exports	% Change
	Exports	Receipts	%	Exports	Receipts	%	1992/88
Angola	2,553	NA	NA	4,795	NA	NA	NA
Benin	476	40	8.4	505	32	6.3	-2.1
Botswana	1,848	38	2.0	2,464	65	2.6	0.6
Burkina Faso	267	5	1.9	302	9	3.0	-0.2
Burundi	136	2	1.5	95	4	4.2	2.7
Cameroon	2,004	21	1.0	2,341	18	0.8	-0.2
Cape Verde	43	3	7.0	49	7	14.3	7.3
CAR	196	5	2.5	166	3	1.8	-0.7
Chad	223	7	3.1	225	21	9.3	6.2
Comoros	37	3	8.1	43	8	18.6	10.5
Congo	899	6	0.7	1,177	6	0.5	-0.2
Cote d'Ivoire	3,00	65	2.2	3,396	53	1.6	-0.6
Djibouti	NA	5	NA	NA	5	NA	NA
Eq. Guinea	51	NA	NA	58	2	3.4	NA
Ethiopia	629	19	3.0	453	23	5.1	2.1
Gabon	1,407	7	0.5	2,606	5	0.2	-0.3

Table 6-3
Tourism's Contribution to Exports in Sub-Saharan Africa (1992)
(US\$ million) - (continued)

	1988	1988	Receipts/ Exports	1992	1992	Receipts/ Exports	% Change
Country	Exports	Receipts	%	Exports	Receipts	%	1992/88
Gambia	144	43	29.9	223	56	25.1	-4.8
Ghana	945	55	5.8	1,105	167	15.1	9.3
Guinea	629	NA	NA	720	NA	NA	NA
Guinea-Bissau	22	NA	NA	18	NA	NA	NA
Kenya	1,864	394	21.1	2,154	442	20.5	-0.6
Lesotho	81	12	14.8	106	19	17.9	3.1
Liberia	NA	NA	NA	NA	NA	NA	NA
Madagascar	398	20	5.0	500	39	7.8	2.8
Malawi	322	10	3.1	417	11	2.6	-0.5
Mali	319	38	11.9	410	45	11.0	-0.9
Mauritania	490	12	2.4	462	15	3.2	0.8
Mauritius	1,382	178	12.9	1,913	299	15.6	2.7
Mozambique	189	NA	NA	304	NA	NA	NA
Namibia	1,177	NA	NA	1,487	91	6.1	NA
Niger	472	11	2.3	332	17	5.1	2.8
Nigeria	7,387	53	0.7	11,617	29	0.2	-0.5
Reunion	NA	NA	NA	NA	NA	NA	NA
Rwanda	159	7	4.4	113	2	1.8	-2.6
Sao Tome & P	14	1	7.1	10	2	20	12.9
Senegal	1,133	147	13.0	1,402	172	12.3	-0.7
Seychelles	182	81	44.5	268	117	43.7	-0.8
Sierra Leone	176	15	8.5	172	17	9.9	1.5
Somalia	50	NA	NA	NA	NA	NA	NA
South Africa	25,403	673	2.6	27,384	1,226	4.5	1.9
Sudan	661	29	4.4	NA	5	NA	NA
Swaziland	523	22	4.2	770	32	4.1	-0.1
Tanzania	458	40	8.7	554	120	21.7	13.0
Togo	602	36	6.0	456	39	8.5	2.5
Uganda	493	8	1.6	250	10	4.0	2.4
Zaire	2,327	7	0.3	NA	7	NA	NA
Zambia	1,242	5	0.4	822	5	0.6	0.2
Zimbabwe	1,902	54	2.8	1,833	105	5.7	2.9

Source: The World Bank *African Development Indicators 1996*

Tourism contribution to exports depends on the type and quality of tourist attractions countries have [Table 6-22]. National parks and game reserves are the two major attractions which are available in most countries. Zimbabwe and Sierra Leone have the greatest number of attractions, while South Africa and Tanzania have only three types of attractions each. Ethiopia's immediate neighbour, Kenya offering mostly wildlife safaris, entertained 698 thousand tourists in 1992 which was (11 times that

of Ethiopia in the same year). Apart from various attractions shown in Table 6-22 above accessibility to international tourist markets, number and frequency of international air crafts movements, number of hotels and number of offices equipped with sufficient information for tourists may also affect the number of tourists visiting a destination. These facilities are presented in Table 6-4.

Table 6-4
Stock of Tourist Facilities in Sub-Saharan African Countries

Country	Int'l Air lines	Int'l Air port	Hotels *	Info centers *
Angola	10	1	4	3
Benin	12	1	4	1
Botswana	3	2	7	2
Burkina Faso	4	1	4	4
Burundi	8	1	4	2
Cameroon	10	2	4	2
Cape Verde	6	1	1	3
Central African Republic	4	1	7	4
Chad	6	1	4	6
Comoros	5	1	5	2
Congo	12	1	4	3
Cote d'Ivoire	17	1	8	4
Djibouti	6	1	4	4
Equatorial Guinea	2	1	2	-
Eritrea	5	1	1	-
Ethiopia	6	1	5	3
Gabon	11	1	7	5
The Gambia	9	1	3	2
Ghana	11	1	9	4
Guinea	12	1	3	4
Guinea Bissau	5	1	3	2
Kenya	34	2	17	3
Lesotho	2	1	5	2
Liberia	3	1	2	1
Madagascar	6	1	10	2
Malawi	7	1	3	3
Mali	12	1	5	3
Mauritania	6	2	4	3
Mauritius	12	1	10	2
Mozambique	8	2	4	2
Namibia	7	1	4	8
Niger	5	1	3	1
Nigeria	20	4	11	5
Rwanda	3	1	4	6
Sao Tome & Principe	3	1	1	-
Senegal	25	1	8	-
Seychelles	7	1	10	3
Sierra Leone	9	1	3	-
Somalia	1	1	-	2
South Africa	45	2	8	4
Sudan	12	1	7	3

Table 6-4
Stock of Tourist Facilities in Sub-Saharan African Countries (continued)

Swaziland	6	1	6	1
Tanzania	17	2	10	4
Togo	10	1	6	1
Uganda	10	1	9	7
Zaire	10	3	2	3
Zambia	12	1	5	1
Zimbabwe	24	3	8	
Average	10	1	5	3

*= only inventory in capital cities

Source: The World of Information The Africa Review 1996

According to the World Tourism Organization tourist Africa witnessed a slight improvement in the growth of tourist arrivals while tourism receipts raised by almost 6 per cent in 1995 over 1994. Table 6-5 shows comparison between various world regions in terms of tourist arrivals and tourism receipts between 1994 and 1995.

Table 6-5
International Tourist Arrivals (1994 - 1995)

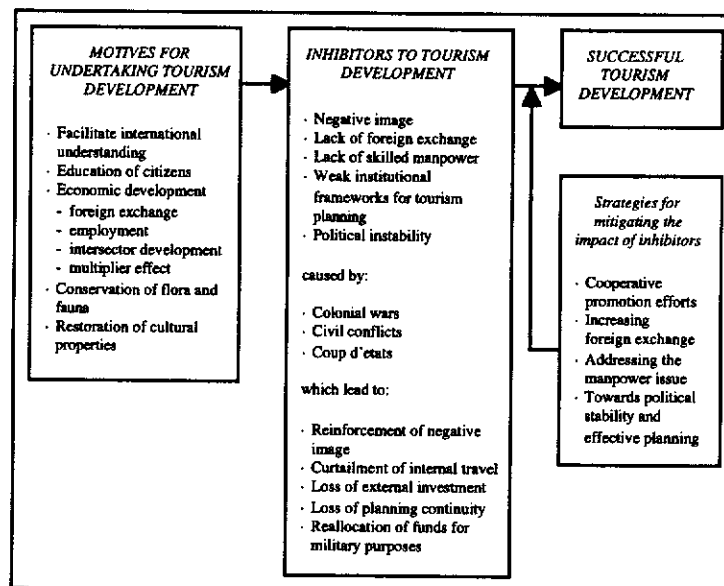
	Arrivals '000	Arrivals '000	% change	Receipts US\$ mi	Receipts US\$ m	% change
	1994	1995	1995/94	1994	1995	1995/94
WORLD	546,269	567,033	3.8	346,703	371,682	7.2
Africa	18,477	18,800	1.7	6,530	6,915	5.9
Americas	107,176	111,944	4.4	95,084	95,239	0.2
East Asia/Pacific	76,973	83,624	8.6	61,990	69,349	11.9
Europe	329,819	337,240	2.3	174,811	189,820	8.6
Middle East	9,875	11,041	11.8	5,129	6,653	29.7
South Asia	3,949	4,384	11.0	3,159	3,706	17.3

Source: World Tourism Organization (1996)

In Africa, holiday makers are less than half of all arrivals during 1989 in East Africa, Kenya (8 per cent) to the south, Zimbabwe (8 per cent) and the Republic of South Africa (7 per cent). 60 per cent of Kenya's visitors are from Europe, with another 12 per cent from North America. Further south, away from the European 'center', only 13 percent of Zimbabwe's tourists are from Europe, whereas 35 percent are from Southern Africa and 40 per cent from East Africa [WTO, 1991a; Harrison, 1992:7].

Harrison (1992:11) further mentioned the case of Botswana, Lesotho and Swaziland which rely on the Republic of South Africa as the regional 'center' for their intake. Despite countries of historical, cultural, scenic and biological richness, Africa receives only 2.6 per cent of global tourism receipts and only 2.8 per cent of all arrivals [Waters, 1989:40]. While distance from major tourist-generating markets and lack of investment capital explain part of the lack-luster record, of equal, or sometimes greater, significance are political factors which inhibit the expansion of tourism in Africa [Teye, 1988a:40]. Of these political factors, political instability appears the most salient [Richter, 1992:40]. Figure 6-1 shows inhibitors to tourism development in Sub-Saharan Africa. Negative image, lack of tourism exchange, lack of skilled manpower, political instability, etc are major inhibitors.

Figure 6-1
Inhibitors to Tourism Development in Sub-Saharan Africa



Source: Ankomah and Crompton, 1990:13

Mill (1990:124) indicated that tourism to Africa is heavily dependent on long-haul traffic. Its development, however, is hampered by a lack of infrastructure and political instability. Sub-Saharan African countries consider tourism as a significant sector. They provide the necessary budgets, open tourism promotion offices

overseas (both within Africa and elsewhere) to market their products, and make sure that the manpower is trained adequately at home or abroad, etc. In Kenya, for example, since 1987, tourism has been the country's leading foreign exchange earner such that by 1990, its earnings had surpassed the combined earnings from coffee and tea [The Weekly Review, 1993:27]. The Kenyan government's efforts in tourism are complemented by inputs from the private sector, which is not only strong but is also willing to invest in the tourism sector, while in other countries, such as The Gambia, where capital from local sources to support tourism is weak, governments have invariably become both developers and managers to bridge the gap arising from a lack of innovation of the private sector [Dieke, 1991:269-270].

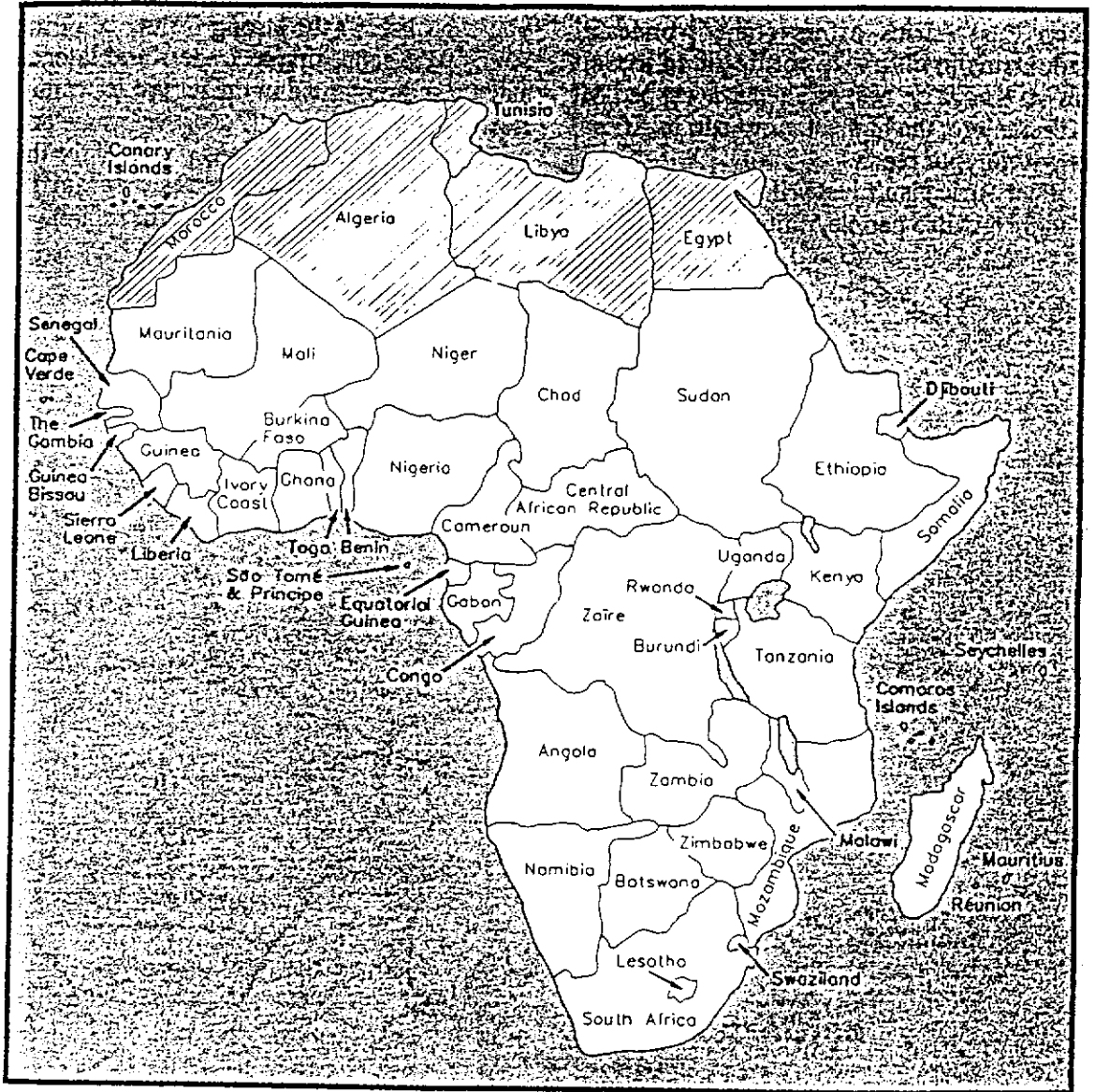
Tourism for Sub-Saharan African countries has become the major source of foreign exchange and employment. However, these benefits do not come by easily. Several factors were to blame: negative image, lack of foreign exchange, lack of skilled manpower, weak institutional frameworks for tourism planning, and political instability [Ankomah and Crompton, 1990:11]. Forrester (1992:38) maintains that most African countries are setting their sights for up market tourism for higher gross revenue per tourist. They must maintain their individuality with unique culture and wildlife. Teye (1988b:222) reiterated that there is need for regional cooperation to suit unique characteristics of individual destinations. For example, for Zambia, the need for a multi-destination development derives from the recognition of serious limitations due to narrow base of its tourism product. Rusinga (1992:41) stresses the need for regional cooperation in order to avert fierce competition Zimbabwe faces with Zambia and Botswana. On the other hand, Nyaruwata (1986:56) points out that tourism marketing is a constant uphill struggle for African countries. The general adverse factors that the image of Africa overseas is not favorable. Besides, the general adverse factors such as economic constraints, social problems and political turmoil further aggravated the situation. Teye (1986:589, 1988a:330) wrote that development of Africa's immense tourism potential is severely limited for reasons

including lack of capital, distance from the large North American and European markets, the cost of travel to Africa, and Africa's poor image abroad, the key factor being political instability.

6.2 Survey of Sub-Saharan Africa

In order to gauge the views of these Sub-Saharan African countries on tourism development, this author conducted a survey between November 1992 and May 1993 (Map 6-1).

Map 6-1
Map of Sub-Saharan Africa



Source: Crowther and Finlay (1991) East Africa: Travel Survival Kit, p.13.



Not included in the survey

Structured questionnaires were sent to 47 Sub-Saharan African countries with international reply coupons to encourage prompt responses. 21 usable responses (44.7 per cent) were received and analyzed.

6.2.1 Findings

Of the twenty one countries which responded to the questionnaire, seven (33.3 per cent) were from Southern Africa, five (23.8 per cent) from the Indian Ocean and Western Africa, respectively. As Figure 6-2 shows three countries were from Eastern Africa and only one from Central Africa.

Figure 6-2
Regional Distribution of Respondents

Region	No of Respondents	Percentage of Total
Southern Africa	7	33.3
Indian Ocean	5	23.8
Western Africa	5	23.8
Eastern Africa	3	14.3
Central Africa	1	4.8
Total	21	100.0
Southern:	Botswana Malawi Mozambique Namibia South Africa Zambia Zimbabwe	
Indian Ocean:	Comoros Madagascar Mauritius Reunion Seychelles	
Western:	Burkina Faso Cote D'Ivoire Niger Senegal Sierra Leone	
Eastern:	Kenya Rwanda Tanzania	
Central:	Cameroon	

The profiles of respondents were as follows: (a) on average 1.08 per cent of the national budget is allocated for tourism for the five year period, 1987/88-1991/9; (b) during the same period the allocation of tourism budget to promotional activities averaged 4.26 per cent; (c) tourism contribution to Gross Domestic Product (GDP) during the same period was 2.49 per cent; (d) 1.63 per cent of tourism budget goes to staff training; (e) 61.9 per cent of respondents have tourism promotion offices overseas; (f) 50.0 per cent of respondents provide promotional materials to tour wholesalers on yearly bases; (g) 57.1 per cent of respondents indicated that private sector participation is very significant; (h) 47.6 per cent of respondents mentioned that political stability is the one factor that has most impact on international tourists' choice of destinations; (i) 40.0 per cent of respondents rated their tourism performance as 'poor'; (j) 55.6 per cent of respondents mentioned that they have tourism advisory councils; (k) 42.1 per cent of respondents train their staff abroad (l) 52.6 per cent of respondents indicated 'relevant training' as a criteria for selecting staff for key positions and (m) national parks and/or game reserves are dominant tourist attractions.

For the question "What percentage of the national budget is allocated for the tourism sector for 1987/88-1991/92?" a mean average of 1.08 per cent of the national budget was allocated for the sector. Table 6-6 shows that while the allocation for 1987/88 was 1.05 per cent, it was 1.22 per cent for 1991/92. This was a 16.2 per cent increase over 1987/88.

Table 6-6
National Budget Allocation for Tourism Sector (N=18)

Year	Mean %
1987/88	1.05
1988/89	1.00
1989/90	1.05
1990/91	1.05
1991/92	1.22

The question "What percentage of tourism budget is allocated for promotional activities for 1987/88-1991/92?" scored an average mean allocation of 4.26 per cent. Table 6-7 shows that the promotional budget was steadily decreasing over the period. The 1991/92 promotional budget was 2.3 per cent less than the 1987/88 budget.

Table 6-7
Tourism Budget Allocation For Promotional Activities (N=20)

Year	Mean %
1987/88	4.35
1988/89	4.30
1989/90	4.20
1990/91	4.20
1991/92	4.25

The question "What is the percentage contribution of tourism to GDP for 1987/88-1991/92?" showed that the sector's average contribution for the period was 2.46 per cent. Table 6-8 shows that the 1991/92 tourism contributors to GDP was 25.4 per cent higher than in 1987/88. This suggests the importance of tourism to export earnings of the surveyed countries.

Table 6-8
Tourism Contribution To GDP (N=14)

Year	Mean %
1987/88	2.28
1988/89	2.35
1989/90	2.42
1990/91	2.50
1991/92	2.86

On average 1.63 per cent of tourism budget is allocated for staff training for the question "What proportion of the tourism budget is allocated for staff training?" However, of the 19 respondents 12 (63.2 per cent) indicated that their allocation is

less than 1 per cent. As Table 6-9 shows five respondents (26.5 per cent) indicated that they allocate between 1 and 3 percent of their tourism budget to staff training. Only one country (5.3 per cent) mentioned 7-9 per cent or more than 9 per cent of tourism budget allocation for staff training.

Table 6-9
Tourism Budget Allocation For Staff Training (N=19)

% Allocated	Number Mentioning	% of Respondents
Less than 1%	12	63.2
1 - 3%	5	26.3
7 - 9%	1	5.3
More than 9%	1	5.3

Asked whether they have tourism promotion offices overseas, how many such offices there are, and where these offices are located, 13 respondents (61.9 per cent) indicated they did have promotion offices overseas. The total number distributed across five continents is twenty eight. As can be seen from Table 6-10, 42.8 per cent of offices overseas were located in Europe. 28.6 per cent were in North America, 21.4 per cent were within Africa and only one each in Asia and Australia. This suggests the majority of tourists come from Europe.

Table 6-10
Tourism Promotion Offices Overseas

Region	Number of Offices	% of Total
Europe	12	42.8
North America	8	28.6
Africa	6	21.4
Asia	1	3.6
Australia	1	3.6

Table 6-11 shows the number of tourism promotion offices overseas for each respondent country. For example, Botswana has three offices in Africa, Europe and North America.

Table 6-11
Continental Distribution of Promotional Offices

	Africa	Asia	Europe	North America	Australia	Total
Botswana	x		x	x		3
Burkina Faso	x					1
Cote D'Ivoire			x	x		2
Kenya			x	x		2
Mauritius			x			1
Namibia			x			1
Reunion			x			1
Senegal			x	x		2
Seychelles	x		x	x		3
Sierra Leone			x			1
South Africa	x	x	x	x	x	5
Zambia	x		x	x		3
Zimbabwe	x		x	x		3

South Africa has the greatest number of offices. It has offices in all five continents. Europe is the most frequented continent for all respondents. Asked "How often do you provide promotional materials to tour wholesalers?" nine respondents (50.0 per cent) indicated they provide wholesalers with materials on yearly bases. 16.7 per cent on quarterly bases. Two respondents supply half yearly or monthly bases or never. Table 6-12 shows the responses.

Table 6-12
Frequency of Supply of Promotional Materials to Wholesalers (N=18)

Interval	No. Mentioning	% Mentioning
Yearly	9	50.0
Quarterly	3	16.7
Half Yearly	2	11.1
Monthly	2	11.1
Never	2	11.1

Table 6-13 shows the countries that supply tour wholesalers with promotional materials and the frequencies of such supplies. For example, Botswana supplies on

half-yearly bases while Kenya supplies yearly. South Africa, on the other hand, supplies monthly, while Zimbabwe supplies quarterly.

Table 6-13
Countries Supplying Materials to Tour Wholesalers

	Monthly	Quarterly	1/2 Yearly	Yearly
Botswana			x	
Burkina Faso				x
Cameroon				x
Cote D'Ivoire				x
Kenya				x
Madagascar			x	
Malawi		x		
Mauritius		x		
Namibia	x			
Reunion				x
Rwanda				x
Sierra Leone				x
South Africa	x			
Tanzania				x
Zambia				x
Zimbabwe		x		

The question "How significant is the participation of the private sector in tourism industry?" scored a 57.1 per cent rating of "very significant" while only 4.8 per cent of respondents indicated the private sector participation is "not significant at all". Table 6-14 shows this.

Table 6-14
Private Sector Participation (N=21)

Rating	No. Mentioning	% Mentioning
Very significant	12	57.1
Significant	6	28.6
Less significant	2	9.5
Not significant at all	1	4.8

Asked to identify the one factor that has the most impact on international tourists' choice of destinations, 47.6 per cent of respondents mentioned "political stability",

38.1 per cent mentioned "tourist attractions", while only 4.8 per cent mentioned "price" of the destination. Table 6-15 shows that the impact of friendly people is only 9.5 per cent.

Table 6-15
Factor That Impacts Most (N=21)

Factor	No. Mentioning	% Mentioning
Political stability	10	47.6
Tourist attractions	8	38.1
Friendly people	2	9.5
Price	1	4.8

40.0 per cent of respondents indicated that their countries' tourism performance was poor. Only 5.0 per cent indicated that the performance was very good. Overall, 75.0 per cent of respondents indicated that tourism performance was very poor to neither poor nor good. As can be seen from Table 6-16, only 25.0 per cent of respondents indicated their countries' tourism performance was good or very good.

Table 6-16
Tourism Performance (N=20)

	No. Mentioning	% Mentioning
Very poor	2	10.0
Poor	8	40.0
Neutral	5	25.0
Good	4	20.0
Very good	1	5.0

Asked whether they have a tourism advisory council, ten respondents (55.6 per cent) said "yes" while eight respondents (44.4 per cent) said "no". Table 6-17 shows that of those who said they have a tourism advisory council, three countries are from the Indian Ocean or Southern Africa. Only one country in Eastern Africa has a tourism advisory council.

Table 6-17
Tourism Advisory Council

	Number "Yes"	Number "No"
Indian Ocean	3	1
Southern	3	3
Western	2	2
Central	1	-
Eastern	1	2

Table 6-18 shows countries that have tourism advisory councils.

Table 6-18
Countries with Tourism Advisory Councils

	Regions				
	Indian Ocean	Southern	Western	Central	Eastern
Botswana		x			
Cameroon				x	
Kenya					z
Madagascar	x				
Mauritius	x				
Namibia		x			
Senegal			x		
Seychelles	x				
Sierra Leone			x		
South Africa		x			

For the question "How is staff training effected?" 42.1 per cent of respondents mentioned "abroad", 26.3 per cent mentioned "higher educational institutions" while 21.1 per cent provide in-house training. Table 6-19 shows only 10.5 per cent of respondents send their staff to vocational schools.

Table 6-19
Mode Of Staff Training (N=19)

	No. Mentioning	% Mentioning
Abroad	8	42.1
Higher educational Inst	5	26.3
In-house training	4	21.1
Vocational schools	2	10.5

Table 6-20 shows countries that train their staff in either of the four modes. Kenya, Cote D'Ivoire, Niger, South Africa and Zimbabwe train their staff in higher education institutions. Botswana, Comoros, Tanzania, for example, send their staff abroad for training.

Table 6-20
Countries Mentioning Modes Of Training

	In-house	Higher education institution	Vocational training	Abroad
Botswana				x
Burkina Faso				x
Cameroon				x
Comoros				x
Cote D'Ivoire		x		
Kenya		x		
Madagascar				x
Malawi				x
Mauritius			x	
Mozambique			x	
Namibia	x			
Niger		x		
Rwanda				x
Senegal	x			x
Sierra Leone	x			
South Africa		x		
Tanzania				x
Zambia	x			
Zimbabwe		x		

For the question "What is the major factor you look for in selecting your staff to key positions?" 52.6 per cent of respondents mentioned "relevant training", while 31.6 per cent mentioned "long service in tourism" sector. Tables 6-21 and 6-22 shows that marketing skills is considered by only 10.5 per cent of respondents. 5.3 per cent look for long service (general) in selecting their staff to senior positions.

Table 6-21
Key Staff Selection Criteria (N=19)

	No. Mentioning	% Mentioning
Relevant training	10	52.6
Long service (tourism)	6	31.6
Marketing skills	2	10.5
Long service (general)	1	5.3

Table 6-22
Regional Distribution Of Training Scheme

	In-house	Higher Education Inst	Vocational Schooling	Abroad
Southern	x	x	x	x
Western	x	x	x	
Eastern	x	x		
Indian Ocean	x			x
Central	x			

Asked to list an inventory of their tourism attractions, 71.4 per cent each mentioned game reserves or national parks. Lakes/lagoons or waterfalls are the least mentioned (only 19.0 per cent of respondents mentioned these attractions). As Tables 6-23 and 6-24 show in addition to game reserves and national parks, scenery, culture, beaches, fishing and climate were mentioned by at least 50 per cent of the respondents. As Table 6-23 shows the inventory of tourist attractions within each respondent country. Kenya has nine kinds of attractions, Sierra Leone has eleven, Zimbabwe has twelve, South Africa, on the other hand, has three attractions only.

Table 6-23
Country Distribution Of Tourist Attractions

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Botswana	x	x	x					x				x	x		6
Burkina Faso	x	x	x					x							4
Cameroon	x	x	x	x		x		x	x	x			x		9
Comoros				x			x		x		x				4
Cote D'Ivoire		x	x			x				x	x				5
Kenya	x	x	x	x			x	x	x			x		x	9
Madagascar	x			x		x	x	x	x						6
Malawi		x		x					x					x	4
Mauritius			x	x			x		x			x		x	6
Mozambique	x	x		x			x	x			x	x		x	8
Namibia	x	x		x	x		x	x			x		x		8
Niger	x	x	x				x								4
Reunion			x			x	x		x				x	x	6
Rwanda	x	x		x					x						4
Senegal	x		x	x			x		x				x	x	7
Sierra Leone	x	x	x	x	x	x	x		x	x			x	x	11
Seychelles	x		x	x			x		x			x		x	7
South Africa		x							x					x	3
Tanzania	x	x				x									3
Zambia	x	x	x	x	x			x	x						7
Zimbabwe	x	x	x		x		x	x	x	x	x	x	x	x	12

Keys: (1) national parks; (2) game reserves; (3) culture;(4) beaches; (5) waterfalls; (6) forests; (7) fishing;(8) wild animals; (9) scenery; (10) lakes/lagoons;(11) city; (12) water sports; (13) history; (14) climate.

Table 6-24
Inventory Of Tourist Attractions (N=21)

	# times mentioned	% of times mentioned
Game reserves	15	71.4
National parks	15	71.4
Scenery	14	70.0
Culture	13	61.9
Beaches	13	61.9
Fishing	12	57.1
Climate	10	50.0
Wild animals	9	42.8
History	7	33.3
Forests	6	30.0
Water sports	6	30.0
City	5	23.8
Lakes/lagoons	4	19.0
Waterfalls	4	19.0

6.2.2 Discussion

Provided that sufficient backing is given to the tourism sector, its contribution to the general economy is be obvious. This can be seen from the contribution it makes to the GDP. Some African countries see the advantage of intra-regional tourism. The result shows that six promotion offices are located within the African continent. This is an encouraging lead towards a regional cooperation in tourism development. Although the majority send their staff overseas for training purposes, a pooling system could have more relevant effects. For example, as can be seen from Table 6-25 in-house training is conducted in all regions. Two regions send their staff abroad while two train in vocational schools [Table 6-22]. Coordination of such training within the regions may be important in the light of similarities of tourist products that are sold. For example, the Utali College in Kenya is a very popular tourism training institution which can be used as an ideal training centre for many countries in the region. It will be beneficial to train staff close to home where the culture, history, type of attractions, etc can easily be incorporated in the classroom.

Foremost on the agenda must be to address the political situation in tourist destinations. As the survey results clearly show, 'political stability' is the major criterion for the tourists' choice of destinations. With the exception of the Central region, all indicated political stability as a major factor. On the other hand, only one Southern African country mentioned "price" as an important factor as well. Table 6-25 shows this.

Table 6-25
Geographical Distribution/Impacting Factor

	Political	People	Attractions	Price
Central			x	
Eastern	x		x	
Southern	x		x	x
Western	x	x	x	
Indian Ocean	x	x	x	

One area which should be looked into seriously is the products that are being marketed. An overlap or duplication is obvious as all destinations scramble to bring in tourists to visit their national parks or game reserves. The quality of the product must be superior to that of competitors in order to attract discerning tourists. Concentration in areas where a destination has a comparative advantage could benefit that destination. It is also time to look into the possibility of joining hands to promote varied products in a multi-destination program. Table shows 6-26 which region most uses tour wholesalers as a medium of promotion.

**Table 6-26
Supply Of Promotional Materials By Region**

	Monthly	Quarterly	1/2 Yearly	Yearly
Central				x
Eastern				x
Southern	x	x	x	x
Western				x
Indian Ocean		x	x	x

Ankomah (1991:441) advised that a long-term tourism development strategy requires the creation of domestic capacity. Countries have to facilitate the training of their nationals both in the region and abroad. Hubbard (1990:51) noted:

Despite the undoubted constraints of promoting tourism in the Third World, there are several external factors currently working in favor of sub-Saharan Africa and the Indian Ocean. In the long haul market, European operators report a downturn in demand for Far East holidays, following the sharp rise in hotel rates; the Caribbean, they argue, is becoming spoilt by the large influx of charter tourists. Demand for the North African destinations has been sharply hit by the Gulf crisis, with the European holidaymakers anxious to avoid any neighboring areas and Arab countries. These factors should provide slack which could be taken up by the sub-Saharan and Indian Ocean destinations...

On the other hand, Sithole (1991:48) pointed out that in Zimbabwe the tourism boom has prompted calls for a long-term strategic plan for the industry, to take into account sustainable numbers of tourists and the protection of the environment, among other things. In Kenya stronger promotion of the country abroad in order to combat the downward trend paid off as 1990 drew to a close, and tourist arrivals were still high, despite the Gulf crisis [Mwere, 1991:39; Dine, 1992:13]. Downward pressure on tourism in the world is being felt due to (1) the recession in prime tourism markets causing people to skip their holidays or else take them closer to home at less expense; (2) inflation in Germany as a result of re-unification and the Bundesbank's replacement of the old Ostmark with Deutschmarks [Dine, 1992:13]. Due to these conditions, says, Dine, "fewer tourists will be journeying to Africa in the next few years". This will lead to over-capacity in countries such as Kenya and Cote d'Ivoire, and isolated incidents in the tourist sites further suggest that a genuinely lucrative tourism income is out of the question, as Dine (1992:13) puts, in countries:(a) where rebels still roam large stretches of the terrain; (b) where bad economic policies do not enable the economy to support the tourism sector by producing tourism consumables at home, and (c) where any brush with officialdom, whether in the airport or at roadblocks, is overbearing enough that tour operators dare not let tourists face them without an escort.

The above negative impression can only be redressed when the African governments strive to maintain political stability. Civil wars, famines and other negative images should be avoided. On the other hand, tourism development would be a reality if governments pay serious attention to this sector. Appropriate budgetary allocations, the creation of promotional offices, the formation tourism advisory councils, the involvement of the private sector, liberalisation of travel, etc, require close government attention. Regional cooperation in promoting tourist products can assist weaker countries in strengthening their capacity to attract more tourists. As the

results indicate, most respondents have identical or similar products - countries could benefit if they concentrate on products for which they have a comparative advantage.

6.3 Conclusion

Briefly, the foregoing survey showed the followings: (a) the success of tourism development depends on a government's role. Prospective (potential) tourists prefer destinations that have a positive image that are politically stable, that have superior attractions, that are cheap and accessible and that have friendly people; (b) wholesale tour operators are an important link in marketing of tourism products; (c) training of manpower is essential for the provision of quality services; (d) the availability of regional tourist circuits benefits participating destinations by reducing competitive campaigns and enhancing complementary campaigns, and (e) promotion of destinations in international markets is a necessity for any destination.

CHAPTER 7

RESEARCH

7.1 Introduction

The objective of the research was to develop a tourism strategy for Ethiopia. In order to achieve this goal, three research questions were formulated to guide the data collection processes. These were: (a) to evaluate the historical development of Ethiopian tourism; (b) to determine the current status of Ethiopia's tourism industry; (c) to define the goals of Ethiopia's tourism industry, and (d) to define a strategy for achieving these goals. The research included secondary data collection, questionnaire surveys, and personal interviews. These were conducted in Ethiopia, Australia, and Sub-Saharan African countries.

7.2 Research in Ethiopia

Field research was carried out in Ethiopia during the first half of 1991. This included collection of secondary data pertinent to tourism and interviewing officials in government, quasi government, private as well as international organizations in order to elicit their perception of Ethiopia's tourism development. In addition, international airlines that have previously, currently or intend having scheduled flights to Ethiopia were asked to comment on their future plans regarding flights to Ethiopia. Table 7-1 shows research activities conducted in Ethiopia and various offices contacted during the research. The interviews were particularly important as there was no evidence of a national strategic tourism plan. The officials interviewed (particularly those from the Ethiopian Tourism Commission and its various departments) were not aware of existence of any formal strategic plan. In addition copies of other interview tapes were also secured from the Commission. These tapes were of interviews given by the Ethiopian Tourism Commissioner and the Legal Adviser to the Ethiopian National Television as well as an interview given by the Head of Tourism Promotion Department to the Amharic Service of Voice of

Germany. Transcripts of all interviews are appended. Furthermore, a few promotional videos were also obtained from the Ethiopian Tourism Commission. These videos provided core material for a video which was subsequently produced at Curtin University and was used in the conduct of some of the surveys with certain groups in Australia. This video is appended.

Table 7-1
Research Activities in Ethiopia

Offices Contacted	Type of Data Collected
Ethiopian Tourism Commission and its Departments: - National Hotels Corp - Ethiopian Tourist Trading Corp - National Tour Operation and Travel Agency Corp - Catering and Tourist Training Institute	Data on tourist arrivals, accommodation, training, manpower, travel agency, tour operations, promotional materials.
Ministry of Transport and Communication and its Departments: - Postal Services Authority - Telecommunications Authority - Roads Transport Authority - Civil Aviation Authority - Ethiopian Airlines	Data on postal services, telephone services, vehicles registered, airports, aircraft fleet, international routes, projections.
Ministry of Culture	Data on historical sites, cultural activities, museums, entertainment.
Ministry of Finance and its Departments - Customs Authority - National Bank of Ethiopia	National budgets, exports, imports, gross domestic product.
Ministry of Foreign Trade	Information on PTA policy regarding tourism development between member countries.
Wildlife Conservation Organisation	National parks, visitations to national parks.
Ethiopian Transport Construction Authority	Existing and planned roads network
Addis Ababa City Council	Parks and public recreation sites
Office of the National Committee for Central Planning Supreme Council	Economic data, tourism data
Office of Foreign Economic Relations	Investment policy
Bekele Molla Hotels Co. Pvt	Private hotels development

**Table 7-1
Research Activities in Ethiopia (continued)**

Offices Contacted	Type of Data Collected
Chamber of Commerce	Export data, investment opportunity
Lufthansa (German) Airline	Scheduled services to and from Ethiopia
Alitalia (Italian) Airline	Scheduled services to and from Ethiopia
European Commission	Contribution to Ethiopia's tourism development
United Nations Economic Commission for Africa (ECA) Organisation of African Unity (OAU)	Role in tourism development programs in Africa. Role in tourism development in member countries

7.3 Research in Australia

In addition to field research in Ethiopia, research was also conducted in Australia. This was as a result of the Australian International Development Assistance Bureau (AIDAB) scholarship award. Research in Australia was necessary in order to elicit perceptions of the general public, professional bodies, academics, as well as Ethiopians residing in Australia, so that a meaningful strategy would be formulated. The participation of the Ethiopian community in Australia was important as it helped to compare perceptions of potential tourists to the region with expatriates. Table 7-2 shows the various bodies that participated in surveys in Australia.

**Table 7-2
Research Activities in Australia**

Offices/Others Contacted	Type of Research
Wholesale Tour Operators	Questionnaire Survey
International Airlines	Questionnaire Survey
Academics, undergraduate and graduate students (Curtin University)	Questionnaire Survey
Alumni members (Curtin University)	Questionnaire Survey
General public	Questionnaire Survey
Ethiopian community in Australia	Questionnaire Survey

7.4 Research in Sub-Saharan African Countries

Questionnaire surveys were also conducted among Sub-Saharan African countries. This was essential as it helped reveal factors that impact on these countries' urge to develop tourism. Many of these countries have similar levels of economic, political as well as social developments to that of Ethiopia. Most importantly, the respective governments' involvement in tourism development by means of budgetary allocations, their drive to produce skilled work force for the industry, their mode of promoting tourist attractions, etc. were essential feedback for the formulation of an appropriate tourism strategy for Ethiopia. Table 7-3 shows twenty-one countries in Sub-Saharan Africa which participated in the survey.

Table 7-3
Sub-Saharan African Countries which Responded to
Questionnaire Surveys

Country	Region
Botswana	Southern
Burkina Faso	Western
Cameroon	Central
Comoros	Indian Ocean
Cote d'Ivoire	Western
Kenya	Eastern
Madagascar	Indian Ocean
Malawi	Southern
Mauritius	Indian Ocean
Mozambique	Southern
Namibia	Southern
Niger	Western
Reunion	Indian Ocean
Rwanda	Eastern
Senegal	Western
Seychelles	Indian Ocean
Sierra Leone	Western
South Africa	Southern
Tanzania	Eastern
Zambia	Southern
Zimbabwe	Southern

Of these seven countries are in Southern Africa, five in Western Africa, three in Eastern Africa, one in Central Africa and five in the Indian Ocean. Detailed analysis of the Sub-Saharan African survey was presented in Chapter 6.

7.5 Research Methodology

As mentioned earlier, both primary and secondary research methods were applied during the field work. The secondary research was based on historical data as well as previous studies of the Ethiopian tourism sector by consultants such as Arthur D. Little, Tourconsult, etc. These studies were sponsored by the United Nations specialised agencies. The studies were supposed to pinpoint strategic thrust for the sector; however, instead they focused on operational matters. In light of their exorbitant costs, their contribution to strategic plan was minimal.

7.5.1 Personal Interviews

Structured interviews were conducted in Ethiopia. Officials of the Ethiopian Tourism Commission and its departments, the Addis Ababa City Council, international organizations, international airlines, and a private hotel developers were included. During preliminary discussions with many officials in the Commission, the latter expressed that there was no strategic plan for tourism. The interviews were structured in such a way as to provide an opportunity for eliciting the information from Ethiopian officials that would have formed part of the strategic plan had there been one. Each interview was structured to suit the respondents' role in the organizations and hence their ability to contribute to the strategic plan. (All interviews are appended.)

Questionnaires were designed and administered in Ethiopia, Australia and Sub-Saharan African countries. These questionnaires were of varied size and content to suit the type of information required. Analyses of the results focused on descriptive statistics using SPSS package. Supplementary research included securing from the

Ethiopian Tourism Commission copies of studies conducted by consultants, promotional videos, and television and radio interviews given by the Commissioner and his department heads. Seventeen officials from various organizations were interviewed. Although the context of each interview was slightly different the general thrust was that Ethiopia's tourism potential is very high, with abundant historical, cultural, natural, scenic attractions. All indicated that due to the country's political uncertainty, civil wars, and the 1984/85 drought, the country's image was very low. This was true as evidenced by all questionnaire survey results. Ethiopia's historic routes (north) had been well publicised in tourist generating countries prior to the 1974 Revolution. The military government's change of political ideology adversely impacted on tourist flows.

The interviews also revealed that budgetary constraints hindered concerted and rapid development of the attractions. As the government was engaged in protracted wars with secessionist forces in the north, priority was given to the defence and security of the country. Tourism was given least priority. Promotional budgets were very low. It was not possible to open promotional offices overseas. The Commission was forced to rely on Ethiopian Air Lines and to some extent on Ethiopian Embassies in a few countries for promotional purposes. Although there existed a tourism forum, comprising some ministries, there was no satisfactory coordination. For example, at some stage the Commission, Ministry of Culture and the Ethiopian Orthodox Church were promoting the same attraction in their own ways, leading to confusion.

Moreover, there was no satisfactory relationship between the National Tour Operation and Travel Agency Corporation and the Addis Ababa City Council. The latter claimed that it had tourist attractions that could be included in tours but it had never been approached by NTO to this effect. Manpower training has been going on for the past several years. A great number of operational level staff was trained in the Catering and Tourist Training Institute (CTTI). Supervisory and managerial

level training take place abroad. It was indicated that facilities at the Institute were very limited forcing the former to run training programs below capacity. Furthermore, the Institute has not liaised with the Ministry of Education for the development of a curriculum that would include tourism studies. Neither was there any attempt to work closely with tourism training institutions of other African countries.

Accommodation in the country has not grown as it should have. There were shortages of hotel rooms suitable for foreign visitors. The government time and again was compelled to evict Ethiopian and resident room occupants in favor of conference delegates from African countries. Despite this acute shortage, a plan to construct a 500-room international standard hotel remains on the drawing board. Private hoteliers were not authorised to provide accommodation to tourists. Even the single private hotel developer accredited for his quality hotels was faced with red tape to secure land for a new hotel development at Modjo, a strategic town leading to tourist attraction areas in the east, south and central regions. The National Tour Operation and Travel Agency Corporation has been the sole tour operator and travel agent in the country. Its fares are so exorbitant that tourists do not think it worth considering a visit to Ethiopia. Instead international tourists select destinations which offer quality attractions at competitive prices. Facilities at the international airport at Addis Ababa need to be improved. Body searches should be replaced with modern ways of detection. Both immigration and customs procedures need an appraisal. The airport requires more runways and amenities.

Private sector involvement in providing tourist facilities is virtually non-existent. The government has monopolised everything from accommodation, to travel agencies, to tour operation, to duty free and gift shops. This has created adverse effects. The 1990 Mixed Economic Policy was formulated to allow private sector involvement in hotel development, tour operation and travel agency. It is yet to be

seen whether it is being implemented correctly. It was revealed that promotional efforts were very low due to foreign exchange constraints. However, attempts to promote jointly with neighbouring countries usually faced hostile responses. This has left the country's tourism development attempt in the cold. Both the United Nations Economic Commission for Africa (ECA) and the Organization of African Unity (OAU), have been advocating an integrated approach to promotions in the region - i.e. a formation of tourist circuits. For example, Ethiopia, Kenya, Tanzania and Zimbabwe could form an ideal circuit. However, the latter are not interested in this approach as each destination scrambles for the tourist dollar. While the foregoing succinctly summarises the highlights of the interviews the full texts are appended for detailed reading.

7.5.2 Questionnaire Surveys

Ethiopia's image in the international arena has been one of the darkest since the 1974 revolution. This has been due not only of to natural phenomena that led to the starvation and death of millions of innocent people [Relief & Rehabilitation Commission, 1985; Freedom House, 1990]. But it was mainly due to political and ideological expediencies of the military government that took power by overthrowing Emperor Haile Selassie I in September 1974. The military Government followed a ruthless policy under the guise of Marxist ideology whereby relations with the Western countries were reduced to their lowest level. Besides, the long and protracted civil war in the north of the country, particularly in Eritrea and Tigray, as well as other areas in addition to isolating the country from the rest of the world also drained the nation's scarce resources that could otherwise have been used for development purposes.

The Commission of the European Community (1990:6) had this to say; "A long and protracted war in the northern provinces of Eritrea and Tigray has been a major drain on the country's limited resources." More than a third of the national budget was

allocated to defence and internal security. According to the Central Statistical Authority (1990:249) between 1983/84 and 1987/88 the Government allocated an average of 43 per cent of the budget to both defence and internal security. As a result, the tourism sector was one of the least prioritized areas in the national budget. Only 0.4 per cent of the capital expenditure was allocated to tourism development between 1985/86 and 1987/88 [CSA, 1990:252-254]. Tourist facilities have not been developed as they should have because of the economic policy that put all major economic activities under the government control. The Commission of the European Community (1990:6) indicated that apart from civil war and drought, policy and institutional factors have also created an unfavourable environment in which to carry out development. Nor was improvement made in areas such as visa, customs, foreign exchange etc. [Growther, 1989; Ethiopian Tourism Commission, 1991].

As Buckley and Witt (1990:7) emphasise major constraints in this regard include travel restrictions, poor quality of tourist provisions, inadequate marketing and promotion, and political difficulties. In an attempt to redress these unfavourable conditions the Government issued a mixed economic policy in February 1991 in order to boost the development of tourism sector, among others. Private investment was allowed in hotel development, tour operation, travel agencies and the like [Addis Ababa Chamber of Commerce, 1991; Office of Investments and Joint Venture, 1991]. However, before this new policy was put to test, a new wave of change engulfed the country on May 28, 1991 and with it the fate of the country's unity appeared more bleak than ever before. Moreover, the question of Eritrea's independence further gives rise to a new scenario regarding the development of tourism in the country [Krien, 1992:152; World Book Year Book, 1992]. As Eritrea officially declared independence in April 1993, the country (Ethiopia) has effectively lost one of the biggest potential tourist centres - the Red Sea coast and Marine Islands.

As mentioned earlier, the image of Ethiopia has not been favourable in the outside world. An image of a destination is one of the determinants of travel behaviour. Telesman-kosuta (1989:558) wrote that the sources of information to create positive or negative images include the family, mass media, school teachers, text books, fiction, political parties, religious teachings, and travellers who recount their experiences. The international community's perception of Ethiopia has not been favourable and so as to understand whether an unfavourable image would deter any future tourism development strategy and to gain an insight into how Ethiopia is perceived as a tourist destination, a study was conducted between September 1991 and July 1992.

7.6 Academics' and Students' Perception of Ethiopia as a Tourist Destination

The first study focused on academics and final year marketing students in the Division of Business and Administration, Curtin University of Technology, Perth Australia. A total of 89 participants were involved. A two part questionnaire was administered at a lunch-time seminar and in the classroom. Both seminar and classroom lectures were aided by a 20-minute video and slides showing the unique features and tourist attractions of Ethiopia. Part One of the questionnaire was administered prior to the viewing of a 20-minute video and slides while Part Two was administered after the show and discussion. This was necessary in order to see whether respondents' awareness of a particular tourist destination was enhanced by providing information about that destination.

7.6.1 Results and Discussion

For the question whether they have travelled overseas, 83 respondents (93.3 per cent) indicated that they had. Of those 73.5 per cent went to Asia followed by Europe (47.0 per cent) and North America 27.7 per cent. Table 7-4 shows response rates.

Table 7-4
Overseas Travel (N=83)

Region	Number Mentioning	Percentage
Asia	61	73.5
Europe	39	47.0
North America	23	27.7
Africa	16	19.3
South America	3	3.6
All Regions	1	1.2
None	12	14.4

Percentages do not add up to 100% due to multiple responses.

Table 7-5 shows that those who visited Africa (16) half (50.0 per cent) went to Southern Africa. Eastern Africa got 37.5 per cent while only 6.2 per cent went to Western Africa.

Table 7-5
Visits to Africa (N=16)

	Number Mentioning	Percentage
Southern Africa	8	50.0
Eastern Africa	6	37.5
Northern Africa	3	18.7
Central Africa	2	12.5
Western Africa	1	6.2

Percentages do not add up to 100% due to multiple responses.

As can be seen from Table 8-5 87.5 per cent of those who visited Africa went to Southern and Eastern Africa as these regions have popular tourist attractions. Only 2.3 per cent of the total respondents mentioned that they had been to Ethiopia. Asked to express their view about Ethiopia, 65.2 per cent mentioned that the country is famine stricken, 51.7 per cent mentioned underdevelopment while only 16.2 per cent view the country as remote. Table 7-6 details these views.

Table 7-6
View of Ethiopia (N=89)

	Number Mentioning	Percentage
Famine stricken	58	65.2
Underdeveloped	46	51.7
Poor	42	47.2
Politically unstable	40	44.9
War ravaged	31	34.8
Long history and civilisation	18	20.2
Remote	15	16.9

Percentages do not add up to 100% due to multiple responses.

In answer to a question about the country's civilisation, half of the respondents (50 per cent of 88) indicated that they do not have knowledge about the country's civilisation. 37.5 per cent indicated that the country's civilisation dates back to B. C. Asked to indicate the level of their knowledge about Ethiopia 85.2 per cent of respondents rated it from extremely poor to poor while only 1.1 per cent expressed it as extremely good. Table 7-7 shows only 14.7 per cent of all respondents indicated that they had fair to extremely good knowledge of the country.

Table 7-7
Knowledge of Ethiopia (N=88)

Region	Number Mentioning	Percentage
Poor	33	37.5
Very poor	30	34.5
Extremely Poor	12	13.6
Fair	9	10.2
Good	3	3.4
Extremely good	1	1.1

Respondents were asked to list the three most important features that are considered essential for a tourist destination. Their responses shown in Table 7-8 were varied and the most prominent features include friendly people, tourist attractions and

accommodation. Other features included were natural features, varieties of activities, shopping facilities, etc.

Table 7-8
Essential Features for a Tourist Destination

Friendly people	55.1%
Tourist attraction	36.0%
Accommodation	31.5%
Natural features	29.2%
Variety of activities	22.5%
Shopping facilities	22.5%
History	19.1%
Language (English speaking)	15.7%
Transportation	15.7%
Safety	14.6%
Price of holiday	10.1%
Political stability	9.0%
Level of economic development	7.9%

Percentages do not add up to 100% due to multiple responses

Based on the above features, respondents were asked if they consider Ethiopia as a tourist destination. As shown in Table 7-9 only 18.4 per cent indicated they consider the country as a tourist destination while the majority (54.0 per cent) do not think so.

Table 7-9
Is Ethiopia Considered A Tourist Destination (N=87)

	Number Mentioning	Percentage
No	47	54.0
Do not know	24	27.6
Yes	16	18.4

The foregoing sections suggest that the perception of Ethiopia is not favorable. However, the following section clearly shows that given proper feedback people would be able to change their perception of a given destination. The second section of the survey was administered after the viewing of video and slides and discussion. It was intended to gain an insight into how participants relate their previous view of

Ethiopia to this. The effort was to determine whether people's perception of a destination (Ethiopia) can be changed positively through proper information. Along this line the following results were obtained for questions in part two. The first question in this section was to discover a participant's knowledge about Ethiopia. In contrast to responses in Part One where 85.2 per cent rated their knowledge from extremely poor to poor, only 27.2 per cent responded in this category in Part Two. Table 7-10 shows that 73.0 per cent indicated their knowledge from fair to extremely good. This is a significant lead from the 14.7 per cent response in Table 7-7.

Table 7-10
Knowledge of Ethiopia (N=85)

	Number Mentioning	Percentage
Fair	42	49.4
Good	17	20.0
Poor	11	12.9
Very poor	9	10.6
Extremely poor	3	3.5
Extremely good	2	2.4
Very good	1	1.2

Asked to identify feature/s that impressed them most from the video and slides, 48.3 per cent indicated landscape and scenery, 42.5 per cent indicated wildlife, while only 5.7 per cent appreciated art-facts. Table 7-11 shows that according to the opinion of the respondents landscape and scenery, wildlife and history are the most likely areas to attract prospective tourists.

Table 7-11
Features that Impressed Most (N=87)

	Number Mentioning	Percentage
Landscape and Scenery	42	48.3
Wildlife	37	42.5
History	29	33.3
People	15	17.2
Cultural Activities	13	14.9
Artifacts	5	5.7

Whether Ethiopia could become a tourist destination in the future was another question to which respondents were asked to give an opinion, either 'yes' or 'no'. Table 7-12 shows that 60.0 per cent responded 'yes' while only 3.5 per cent said 'no' but almost a third (32.9 per cent) were not sure while 3.5 per cent did not know whether the country could become a tourist destination. The two groups ("not sure" and "do not know") make up 36.4 per cent. This is a significant size that could be convinced that the country could provide quality attractions.

Table 7-12
Could Ethiopia Become a Tourist Destination? (N=85)

	Number Mentioning	Percentage
Yes	51	60.0
Not sure	28	32.9
No	3	3.5
Do not know	3	3.5

Responses to the question, 'what areas do you think need improvement in order to attract tourists?' attracted a range of responses. Table 7-13 shows that the country's image featured prominently with 73.6 per cent of responses. This is followed by political stability (55.2 per cent) and promotional activities (47.1 per cent). Promotional activities and government policy also are requiring serious considerations for improvement. Visa and customs formalities were mentioned by the least number of respondents (8.0 per cent).

Table 7-13
Areas Needing Improvement (N=87)

	Number Mentioning	Percentage
The country's image	64	73.6
Political stability	48	55.2
Promotional activities	41	47.1
Government policy	30	34.5
Infrastructure	22	25.3
Hotels	13	14.9
Banking facilities	9	10.3
Institutional restructuring	8	9.2
Customs formalities	7	8.0

Percentages do not add up to 100% due to multiple responses.

Asked whether they would consider visiting Ethiopia at a later date, 74.1 per cent of respondents indicated their affirmation while only 4.7 per cent said 'no'. Table 7-14 shows that a fifth of the respondents were not sure whether they would visit the country in the future. This shows a window of opportunity for the tourism authorities of the country.

Table 7-14
Consider Visiting Ethiopia (N=87)

	Number Mentioning	Percentage
Yes	65	74.7
Do not know	18	20.7
No	4	4.6

Asked whether they would pass on the knowledge they have gained about Ethiopia to others as shown in Table 7-15, 69.8 per cent indicated 'yes' while 7.0 per cent indicated 'no'. Again 23.3 per cent (more than a fifth of the respondents) were not sure whether they would tell their friends and relations the good things they had seen about Ethiopia.

Table 7-15
Would Pass On Knowledge About Ethiopia? (N=86)

	Number Mentioning	Percentage
Yes	60	69.8
Not sure	20	23.3
No	6	7.0

Word-of-mouth is an important information dissemination tool and as such tourist destinations either benefit or suffer from types of information passed on by this method as narrators can either speak about positive and negative aspects of a destination. Asked which other African tourist destinations they would include in their itinerary should they decide to visit Ethiopia in the future, 70.1 per cent indicated Egypt and 50.6 per cent indicated Kenya. Table 7-16 shows that the two destinations (Egypt and Kenya) are the most favoured circuits to include Ethiopia in the tour. The Southern Africa destinations - South Africa, Zimbabwe and Botswana scored a cumulative response of 58.5 per cent. However, they would not attract a significant response in their own right due to geographical distance. The Eastern African destinations of Kenya and Tanzania scored 63.2 per cent between them. This is less than the rating for Egypt only. Therefore the most popular destination that could be combined in the itinerary would be Egypt.

Table 7-16
Preferred Destinations (N=87)

	Number Mentioning	Percentage
Egypt	61	70.1
Kenya	44	50.6
South Africa	25	28.7
Zimbabwe	17	19.5
Tanzania	11	12.6
Botswana	9	10.3

Percentages do not add up to 100% due to multiple responses.

This is a significant indication for the tourism authorities in the region. The question of regional integration of tourism development needs a careful assessment in order to benefit from multi-destination international tourists. Joint promotional campaigns, smooth customs formalities and immigration policies, inter-connections within the countries by adequate transport modes and other areas need to be worked together. The Cairo-Gaborone Trans-African Highway system would become a contributing factor in this regard. [ECA,1987] Egypt with its ancient history and Kenya with its wildlife attracted 1.36 million and 6.6 thousand tourists, respectively, in 1986 and 1987 [Krien, 1992:145, 268]. Ethiopia, with its abundant natural and man-made tourist attractions, can definitely benefit from this regional cooperation. The country's geographic location can create an ideal marketing strategy. Boniface and Cooper (1987:134) wrote that Ethiopia is of particular interest to cultural tourism as its heartland is an ancient Christian civilisation, and attractions include the game reserves of the Rift Valley, Lake Tana, and the monasteries of Axum and Lalibela.

7.7 Tour Operators' Perception of Ethiopia as a Tourist Destination

Tourism marketing has been an uphill struggle for Ethiopia, a country rich in history, culture, flora and fauna and other tourist attractions, yet it trails far behind its next door neighbours - Kenya, and Tanzania or Zimbabwe. Besides the general adverse factors common to developing countries, the international image of Ethiopia leaves much to be desired. The country is perceived as famine stricken, war ravaged, politically unstable, etc. This perception is no exception in Australia. Television portrayed images of starving children created in the minds of the Australian community at large automatically associates Ethiopia with misery. Under such conditions, it is very hard to imagine that Ethiopia would be considered as a tourist destination. However, no study has been undertaken here to assess the perception of the public in general and tour operators in particular about Ethiopia to determine the views. Nyaruwath (1986:56) reiterated,

...there has been little work undertaken to attempt to assess in quantitative terms tour operators' views of the different African destinations. This has been a major omission on the part of Africa's different national tourist organizations because tour operators are a crucial and powerful link in the travel industry.

Teye (1989:23) indicated, "The expanding role of tour producers in tourism marketing as well as the significance of their perception of destinations provide the rationale for focusing on tour producers". Ingram and Durst (1989:11) reiterated that the tour operator is the most vital link between tourist attractions and potential visitors in both developing and developed countries. Erbs (1986) added, "they [the tour operators] are the ones who choose the places to be visited and itineraries to be followed, can fill the means of transport and accommodation capacity or leave them empty, impose standards and partly dictate prices especially for accommodation." Importance of tour operators is further emphasised by Hudman and Hawkins (1989:144) who wrote, "Wholesalers are important, they sell tours to exotic places that may not be in enough demand to justify a travel agent's time in preparing, marketing and selling them.". Goodall et al (1988) indicated that tour operators dictate not only the nature of holidays but also the destinations at which they are taken. Mill and Morrison (1985:239) said, "Tour operators can wield a great deal of influence over destinations. Operators have the ability to direct large numbers of tourists to particular destinations". Tour operators may have negative perceptions (images) about a particular destination (Reilly 1988). The perception they have can take any of two forms: organic or induced. According to Gunn (1985:32)

An organic image is formed as a result of general exposure to newspaper reports, magazine articles, television reports, and other specifically non-tourist information. The second level is that of an induced image... an image brought about by tourist-directed information, such as advertisements and travel posters.

Although tour operators impose significant influence on travellers' decision making processes, it is not, however, to discard other factors that also affect the formers' choice of destination. For example, travellers may follow their friends' recommendations in the selection of a holiday centre. [Holloway and Plant, 1988:107]. Chon et al (1991:31) showed that tourists make decisions on places to visit based on the images, beliefs and perceptions they hold of a destination. In a family circle the wife may have significant influence in choosing the holiday destination. Notwithstanding, the various decision making processes, this study was conducted in order to understand the Australian Tour Operators perceptions of Ethiopia as a tourist destination.

7.7.1 Methodology

Questionnaires were distributed in person in Sydney and Perth as well as mailed to Melbourne wholesale tour operators and Airlines during the first half of June 1992. After a follow-up in July 1992, Table 7-17 shows response rates.

Table 7-17
Questionnaire Distributions to Tour Wholesalers in Australia

City	Mode of Contact	No. Contacted	Total Response	Useable	% Useable over No. Contacted	% Useable over Total Response
Sydney	In person	100	44	38	38.0%	86.3%
Melbourne	Mail	26	19	12	46.1%	63.1%
Perth	In person	15	15	11	73.3%	73.3%
Total		141	78	56	39.7%	71.8%

The decision for personal contact was made after an exchange of ideas with the Marketing Department of WA Tourism Commission. Based on their experience in the industry, this was recommended as more fruitful approach compared with a mail survey. According to Table 7-17, 39.7 per cent of the total number of businesses contacted were useable although the overall response rate was 55.3 per cent. On the

other hand, of the total number of responses (78), 71.8 per cent were useable (56). The questionnaire intended to obtain information in three parts, Part I focused on the respondents' perception of Ethiopia as a tourist destination. Part II was about the businesses while Part III concerned profiles of respondents.

7.7.2 Results and Discussion

As Table 7-18 shows, 34.7 per cent of respondents were managers/general managers. 26.5 per cent were directors or managing directors. The third category were sales/marketing managers (18.4 per cent) followed by consultants (16.3 per cent).

Table 7-18
Profile of Respondents

Position	
Manager/General Manager	34.7%
Director/Managing Director	26.5%
Sales/Marketing Manager	18.4%
Consultants	16.3%
Others	<u>4.1%</u>
	100.0%
No. of Years worked in Tourism Industry	
Less than 5 years	8.3%
5 to 9 years	20.8%
10 to 14 years	20.8%
15 to 19 years	8.3%
20 years and over	<u>41.7%</u>
	100.0%

41.7 per cent of the respondents had worked in the tourism industry for twenty or more years while only 8.3 per cent had less than five years and between fifteen and nineteen years of industry experience. 41.6 per cent worked in the tourism industry between five and fourteen years. Of the respondents 88.2 per cent, were wholesale tour operators while the remaining 11.8 per cent were airlines. The size of these businesses in respect of employment varies widely. Table 7-19 shows that 29.6 per cent employ less than five persons while 25.9 per cent employ 20 or more persons. 44.5 per cent of respondents employ between five and nineteen persons.

Table 7-19
Number of Employees

Less than 5	29.6%
5 to 9	24.1%
10 to 14	14.8%
15 to 19	5.6%
20 and over	<u>25.9%</u>
	100.0%

As Table 7-20 indicates, clients of the wholesale tour operators and airlines include business travellers (66.7 per cent), vacation travellers (42.6 per cent), holiday makers (79.6 per cent) and others (16.7 per cent), and stay in their places of holidaying from less than 3 nights to more than 11 nights.

Table 7-20
Client Base

Holiday maker	66.7%
Business traveller	42.6%
Vacation taker	79.6%
Other	16.7%

Percentages add up to over 100% due to multiple responses

The geographic regions in which the wholesalers operate cover all continents with Australia (domestic sector) taking up 27.2 per cent. As shown in Table 7-21, Europe takes up 16.0 per cent followed by Asia (14.6 per cent). Africa with only 9.2 per cent trails in the end. However, this is not the case in the volume of business conducted in these regions. Asia (35.3 per cent) leads in this category with Europe (27.5 per cent) following. Australia (domestic sector) is fourth while Africa, again with 3.9 per cent of volume of business, trails.

Table 7-21
Geographical Area/Volume of Business

	Area %	Rank	Vol.	Rank
Australia	27.2%	1	9.8%	4
Pacific Rim	11.2%	5	5.9%	5
Middle East	9.7%	6	3.9%	6
Asia	14.6%	3	35.3%	1
Europe	16.0%	2	27.5%	2
Africa	9.2%	7	3.9%	7
America	12.1%	4	13.7%	3
	100.0%		100.0%	

On a seven point scale from 1 'not important at all' to 7 'extremely important', clients of these wholesalers view political stability (mean 6.52) as the most important element in assessing suitable holiday destinations. Table 7-22 shows that this is followed by culture (mean 5.22) and nature (mean 5.14).

Table 7-22
Bases for Selecting Holiday Destination

Rank		Mean
1	Political stability	6.52
2	Culture	5.22
3	Nature	5.14
4	Climate	5.12
5	Wildlife	4.98
6	Beaches	4.74
7	Economic Development	4.56
8	History	4.50
9	Archaeology	3.86
10	Religion	3.10

Respondents' rating of their knowledge about Ethiopia is entirely below average. On a seven point scale with 1 'no knowledge at all', and 7 'very knowledgeable' the highest rating was a mean of 3.31 for knowledge about the country's political stability. Table 7-23 shows that the respondents have very little knowledge about the country's rich culture, wildlife, history or civilisation.

Table 7-23
Knowledge about Ethiopia

Rank		Mean
1	Political stability	2.36
2	Economic Development	2.41
3	Scenery	2.25
4	Civilisation	2.32
5	History	2.43
6	Wildlife	3.31
7	Culture	2.98

Again, the perception of the destination is no more encouraging than the knowledge about it. On a seven point scale from 1 'very negative' to 7 'very positive' only the country's long history (mean 4.74) received just above average evaluation [Table 7-24].

Table 7-24
Perception about Ethiopia

	Mean	Std Dev
Long history and culture	4.74	1.925
Growing	3.51	1.601
Developing country	3.51	1.676
Remote	3.24	1.479
Accessible	3.11	1.437
Politically unstable	2.73	1.805
Famine stricken	2.56	1.907
War ravaged	2.51	1.804
Poor	2.47	1.896

Table 7-24 shows that with the exception of history, all other variables received negative perceptions. Negativity is severe where respondents viewed the country as poor (mean of 2.47). The respondents knowledge about Ethiopia is in most parts based on reports in the media - 74.5 per cent, while business contacts and friends contributed only 18.2 per cent. As shown in Table 7-25 virtually all information is based on media reporting. Business contacts or friends made up 18.3 per cent of sources while promotional materials accounted to only 10.9 per cent.

Table 7-25
Source of Knowledge

Source	Mean
Media	74.5%
Business Contacts	18.2%
Friends	18.2%
Educational Institutions	14.5%
Other	12.7%
Promotional Materials	10.9%
Relatives	1.80%

Due to multiple responses percentage totals do not add up to 100%

Based on their limited knowledge of Ethiopia, respondents' ratings of the country's tourist features were not encouraging either. On a seven point scale from 'extremely poor' to 'extremely well', only the country's history was rated above average (mean 4.173). The lowest rating was given to tourist information (mean 1.68). Table 7-26 indicates that cultural, diversity, tourist attractions, visa formalities and others are rated very low. This is due to very little knowledge the respondents have of Ethiopia.

Table 7-26
Ratings of Tourist Features

Features	Mean
History	4.17
Cultural diversity	3.69
Tourist attractions	2.75
Visa formalities	2.52
Customs politics	2.51
Beaches	2.51
International airfare costs	2.40
Communications	2.26
Events	2.23
Food	2.23
Accommodation	2.21
Transportation	2.19
Banking facilities	2.18
Entertainment	2.14
Shopping facilities	2.09
Political stability	1.98
Standard of living	1.92
Tourist information	1.68

It is not surprising to get a 1.68 rating for tourist information as the Ethiopian Tourism Commission makes no contact at all with wholesalers. Respondents indicated that the country's image was at the top of a list of areas that need improvement (mean 6.46) followed by political stability (mean 6.39) and promotional activities (mean 6.38). Table 7-27 shows that areas from the country's image to international airfares require improvement.

Table 7-27
Areas Needing Improvement

	Mean
The Country's image	6.46
Political stability	6.39
Promotional activities	6.38
Government policy	5.84
Accommodation	5.58
Infrastructure	5.96
International accessibility	5.77
Banking facilities	5.24
Institutional changes	5.28
Visa formalities	5.10
Customs	5.02
International airfares	5.57

Government policy, accommodation, infrastructure, etc need to be improved for Ethiopia to successfully develop tourism. According to 72.7 per cent of the respondents, Ethiopia's potential as a tourist destination will not be affected by the current situation in the country's northern province (Eritrea). [Eritrea has become independent since this survey.] On the other hand 96.4 per cent of the respondents indicated that they do not promote Ethiopia because of the country's poor promotional campaign internationally. 79.1 per cent said they would promote Ethiopia had the Government vigorously promoted its tourist products internationally and another 58.3 per cent indicated they would include Ethiopia in their future programs to Africa. However, only 1.8 per cent indicated they had received some promotional materials from the Ethiopian Government in 1990 and those who said they currently promote Ethiopia as a tourist destination (3.6 per cent)

indicated tours to Ethiopia are combined with Egypt (mean 4.50), while Kenya and South Africa (mean 4.00) rated as second alternatives. In order to adopt a favourable approach towards Ethiopia as a tourist destination, 61.3 per cent of the respondents would like to see stable political conditions. Promotion and change in the country's image were listed second and third (48.4 per cent and 22.6 per cent respectively). Responses for these open-end questions are shown in Table 7-28.

Table 7-28
Changes Necessary to Adopt a Favourable Approach

	Percentage
Political stability	61.3%
Promotional activities	48.4%
The Country's image	22.6%
International accessibility	19.4%
Tourist attractions	16.1%
Tourist facilities	12.9%
Hotels	9.7%
Nature and wildlife	6.5%
Training	6.5%
Value for money products	3.2%

Totals do not add up to 100% due to multiple responses

Table 7-29 shows that of those neighbouring tourist destinations Egypt, Kenya, Zimbabwe and South Africa provide respondents with promotional material at least once a year.

Table 7-29
**Governments That Provide Tour Operators With
Tourism Promotional Materials**

	Yes	No
Ethiopia	N/A	N/A
Kenya	64.6%	35.4%
Tanzania	19.0%	81.0%
Uganda	9.5%	90.5%
Egypt	68.1%	31.9%
Zimbabwe	65.2%	34.8%
Botswana	34.1%	65.9%
South Africa	72.9%	27.1%
Namibia	22.7%	77.3%

As Table 7-30 shows of those which provide promotional materials in a significant manner Kenya mainly supplies yearly (66.7 per cent), while South Africa's rate of supply is almost evenly distributed (four times a year). Egypt's supply accounts for 42.3 per cent yearly while Zimbabwe supplies 50 per cent on yearly basis.

Table 7-30
Frequency of Supply of Promotional Materials

	Monthly	Quarterly	Half Yearly	Yearly
Kenya	14.8%	7.4%	11.1%	66.7%
Tanzania	22.2%			77.8%
Uganda	50.0%		50.0%	
Egypt	7.7%	26.9%	23.1%	42.3%
Zimbabwe	7.1%	14.3%	28.6%	50.0%
Botswana	7.1%		35.7%	57.1%
South Africa	22.6%	29.0%	19.4%	29.0%
Namibia	11.1%	11.1%	11.1%	66.7%
Ethiopia	N/A	N/A	N/A	N/A

A comparison of Ethiopia's tourism potential with that of other countries in the region revealed that respondents rate it unfavourably, i.e. below average on a seven point scale from 'extremely poor' to 'extremely well'. Table 7-31 shows that the country cannot compare favourably even with Uganda where tourism development is at its lowest level.

Table 7-31
Comparison of Ethiopia's Tourism Potential
With Countries in the Region

	Mean
Uganda	3.58
Tanzania	3.09
Namibia	3.02
Botswana	2.88
Kenya	2.60
Egypt	2.42
Zimbabwe	2.42
South Africa	2.35

The worst rating was against South Africa (mean 2.35) followed by Egypt, Zimbabwe and Kenya. A lack of knowledge and absence of promotional material may have a significant impact on this comparison. The lack of promotional materials also affected respondents' identification of international airlines that fly to and from Ethiopia. It is interesting to note that only 78.0 per cent of respondents mentioned Ethiopian Airlines - which is the national carrier of the country, while the same percentage (78.0 per cent) also listed Aeroflot (the Soviet Airline). This could be due to the country's close ideological link with the Soviet Union in recent years. On the other hand China Airlines which has regular flights only received a 9.8 per cent response. Yemenia, Alyemda, Saudia, British Airways, Air France, Sabena, Air India, Singapore Airlines and Qantas however, which actually do not have scheduled flights to and from Ethiopia received varying responses. Table 7-32 shows this response.

Table 7-32
International Airlines flying to and from Ethiopia

Ethiopian Airlines	78.0%	Air France	19.5%
Aeroflot	78.0%	Air India	19.5%
Kenya Airways	65.9%	British Airways	17.1%
Saudia	36.6%	Alyemda	14.6%
Lufthausa	31.7%	Sabena	14.6%
Air Djibouti	29.3%	China Airlines	9.8%
Yemenia	26.8%	Singapore Airlines	7.3%
Alitalia	26.8%	Qantas	2.4%

Based on respondents' experience with other countries, the types of promotional information required in order to 'sell' Ethiopia as a tourist destination vary considerably. The most significant information sought is general information about the country (92.5 per cent) followed by brochures, posters, window displays and the like (75.0 per cent) and videos, slides, TV ads (52.5 per cent). Table 7-33 shows this in detail.

Table 7-33
Promotional Information Required in Order to "Sell"
Ethiopia as a Tourist Destination

General information about the country	92.5%
Brochures, posters, displays, pictures, flyers, literature etc.	75.0%
Videos, slides, TV ads	52.5%
Training in the tourism industry	37.5%
Tourist attractions	32.5%
Customs policies	20.0%
Tourist facilities	20.0%
Workshops, seminar slide evenings	17.5%
Political stability	15.0%
History	12.5%
Nature and wildlife	12.5%
Available tours	12.5%
Shopping facilities	10.0%
Change of the Country's image	10.0%

Famine in recent years has created a negative impression of the country. The media played major roles to this end. Lack of promotional activities on the part of the Ethiopian Tourism Commission was also responsible for this negative image. The country is rich in history, culture, wildlife etc (some of which such as the Walia Ibex and Mountain Nyala are indigenous to the country). However, before putting these products into international markets, it is essential that the products are saleable, competitive and worth the price being paid. Ethiopia has a great opportunity to tap the international market. Kenya, for example, is well known internationally for its wildlife safaris - however, a gradual shift of discerning tourists to other untapped destinations would only take a matter of time. Ethiopia, through effective international promotion and through the change of the country's negative image can benefit from this opportunity in the long run. However, as Nyaruwata (1986:59) put, "...before the African national tourist organisations can begin to market their countries overseas, they have to be certain the products they are offering are competitive at international level".

It is further noted that the availability of general information about the country could enhance marketing of the destination. As respondents of this survey had very little

involvement in the continent's tour operation programs in general and no involvement in tours to Ethiopia, an uphill promotional campaign awaits the Ethiopian Tourism Authorities. Kenya, for example, maintains nine tourist offices outside Kenya and the country's tourism growth is partly explained by the promotional efforts of the Kenya Tourist Development Corporation (KTDC), the tourism investment arm of the government [Dieke, 1991:272].

Tour operators must be convinced first and foremost that the country's negative image has changed and the political condition has stabilised. These are of fundamental importance. Consideration should also be given to combined promotions or the creation of joint promotion in the region as one country by itself may not be able to meet the requirements of excessive capital outlay in order to promote internationally. Egypt, Ethiopia, Kenya, Tanzania, Zimbabwe may well create the circuit. Since most of the respondents had insufficient knowledge about the international carriers that fly to and from Ethiopia, it is imperative to show that there are plenty of connections to and from Europe, Africa, Asia and the Middle East. In fact, Addis Ababa is a hub of east-west connections. Ethiopia needs to prove to the Australian Tour Operators that its tourism potential is beyond compare - with diverse attractions: history, culture, wildlife, bird watching, and even health tourism.

7.8 Student and Community Perception of Ethiopia as a Tourist Destination

A daunting task awaits the Ethiopian Tourism Authorities in changing the country's negative image for a meaningful marketing strategy for the country's tourist products. Potential tourists want to know more about a destination before they commit their time, money and other resources into a holiday program. Therefore, an image of a tourist destination is of paramount importance because it transposes representation of an image into a potential tourist's mind and gives him or her a pre-taste of the destination [Fakeye and Crompton, 1991:10]. Fakeye and Crompton

(1991:10) further reiterated that "an image, whether positive or negative, may continue long after the factors that molded it have changed". Tourists definitely try to avoid areas which are negatively perceived. Forrester (1992:38) said, "...they [tourists] have a wide range of holiday destinations on offer and are able to avoid troubled areas". Um and Crompton (1990:433) added that the image and attitude dimensions of a place as a travel destination are likely to be critical elements in the destination choice process, irrespective of whether or not they are true representations of what that place has to offer. Once a negative image is established in the minds of potential travellers through the media either because of war, famine, political stability, etc. even a full range of marketing activities cannot entirely reverse it [Ahmed,1991:25]. Richter (1992:41) explained:

One of the most common problems of ... tourism is that episodic violence or conflict far removed from tourist areas receive so much media attention that it appears the entire nation is engulfed in violence. This is particularly true for developing nations, unfortunately often ignored by Western media unless disaster, war, coup detats, or revolution force them into the headline.

There is a widely held perception of Ethiopia that equates it with famine. Such a perception glosses over the very diverse tourist attractions the country is prepared to offer to the outside world. This survey, therefore, attempts to have an insight into people's perception of the country as a tourist destination and to identify areas that require immediate improvement in order to attract tourists.

7.8.1 Methodology

A two part questionnaire was designed and administered on-campus and off-campus involving a total of 487 participants. These included 297 undergraduates and 58 graduate students in the Curtin Business School as well as 132 non-student mature-age participants. Part I was about the participants' travel experience, their knowledge of Ethiopia, features they consider essential for a tourist destination, as

well as whether they consider Ethiopia as a tourist destination. After Part I was administered, a 12.5 minute video focusing on Ethiopia's tourist attractions was shown. Part II was then administered. It focused on determining whether the participants' perception of Ethiopia changed after the video. It also aimed to obtain profiles of the participants.

7.8.2 Results and Discussion

As Table 7-34 shows, 48.3 per cent of respondents were male and 51.7 per cent were female. 79.2 per cent were 30 years of age or less and 72.9 per cent were students. 80.3 per cent have an income of \$20,000 or less.

Table 7-34
Profiles of Participants

OCCUPATION				
Undergraduate students	297		61.0%	
Graduate Students	58		11.9%	
Non-students	132		27.1%	
Total	487		100.0%	
SEX				
	Undergraduate	Graduate	Non-student	Total
Male	135	25	72	232
Female	159	33	56	248
Total	294	58	128	480
AGE (YEARS, N = 480)				
	Undergraduate	Graduate	Non-student	Total
20 or less	22.2%	1.3%	1.7%	25.2%
21-30 years	37.7%	8.8%	7.5%	54.0%
31-40 years	1.3%	1.9%	9.4%	12.5%
41-50 years		0.2%	3.3%	3.5%
51-60 years			2.5%	2.5%
61 years or over			2.3%	2.3%
Total	61.2%	12.1%	26.7%	100.0%

Table 7-34
Profiles of Participants (continued)

INCOME (\$, %, N = 427)				
	Undergraduate	Graduate	Non-student	Total
-20,000	59.5%	10.5%	10.3%	80.3%
-30,000	1.2%		7.0%	8.2%
-40,000		0.2%	4.2%	4.4%
-50,000			2.8%	2.8%
-60,000	0.2%		2.3%	2.5%
-70,000			1.2%	1.2%
70,001+			0.5%	0.5%
Total	60.9%	10.8%	28.3%	100.0%

89.0 per cent had had overseas travel experience. The majority (86.5 per cent) had travelled in Asia followed by Europe (37.8 per cent) while African travel accounted for only 8.6 per cent. Table 7-35 shows the details.

Table 7-35
Travel Experience

OVERSEAS TRAVEL (% , N=473)					
	Undergraduate	Graduate	Non-student	Total	
Yes	54.7	11.0	23.3	89.0	
No	6.6	0.8	3.6	11.0	
Total	61.3	11.8	26.8	100.0	
CONTINENTS VISITED (#, %, N= 407)					
	Under-graduate	Graduate	Non-student	Total	
Asia	225	43	84	352	86.5
Europe	80	10	64	154	37.8
North America	50	12	38	100	24.6
Africa	8	3	24	35	8.6
South America	8	2	6	16	3.9
Total	253	50	104	407	100.0
	62.2	12.3	25.6		

Table 7-35
Travel Experience (continued)

PARTS OF AFRICA VISITED (#, %, N = 35)					
	Under-graduate	Graduate	Non-student	Total	
Southern	6	2	10	18	51.4
Northern	1	1	11	13	37.1
Eastern	4	2	2	8	22.9
Central	3	1	3	7	20.0
Western	2	1	3	6	17.1
Total	9	4	22	35	
	25.7	11.4	60.9		100.0
BEEN TO ETHIOPIA (#, %, N= 434)					
	Under-graduate	Graduate	Non-student	Total	
Yes	1	1	2	4	0.9
No	267	50	113	430	99.1
Total	268	51	115	434	
	61.8	11.8	26.5		100.0

Of those who had been to Africa 51.4 per cent went to Southern Africa, 37.1 per cent to Northern Africa and 22.9 per cent to East Africa. Western Africa trails with only 17.1 per cent response. Only 0.9 per cent indicated they had been to Ethiopia. The profile of respondents is summarised as follows: (a) age group - between 21 and 30 years; (b) income - \$20,000 or less; (c) travel experience - travelled overseas majority to Asian countries, been to Southern Africa; (d) essential - accommodation is considered essential for a tourist destination; (e) consider Ethiopia as a tourist destination, Ethiopia's image needs to be improved; (f) impression - impressed by the country's landscape and scenery; (g) would combine visits to Egypt and Ethiopia, and (h) very poor to fair knowledge of Ethiopia. 56.1 per cent indicated that Ethiopia's civilisation dates back to centuries before Christ while only 9.8 per cent indicated that it was only a 16th - 20th century phenomenon. Table 7-36 shows the results.

Table 7-36
Knowledge of Ethiopia's Civilisation (#, %, N = 449)

	Undergraduate	Graduate	Non-student	Total	
BC	146	17	89	252	56.1
1-5 century	28	14	14	56	12.5
6-10 century	32	8	6	46	10.2
11-15 century	37	6	8	51	11.4
16-20 century	36	6	2	44	9.8
Total	279	51	119	449	
	62.1	11.4	26.5		100.0

On a seven-point scale from 'extremely poor' to 'extremely good' about knowledge of Ethiopia, it was found that the mean scores were 2.315 and 3.134 respectively for Parts I and II, with an overall rating of 'extremely poor' to 'poor'. However, there was a slight shift in the rating in Part II as can be seen in Table 7-37.

Table 7-37
Knowledge of Ethiopia (#, %, N = 467,470)

Part I

	Undergraduate	Graduate	Non-student	Total	
Extremely poor	80	17	36	133	28.5
Very poor	80	19	40	139	29.8
Poor	92	9	31	132	28.3
Fair	29	11	12	52	11.1
Good	2		4	6	1.3
Very good			1	1	0.2
Extremely good	2	1		3	0.6
Total	286	57	124	467	
	61.2	12.2	26.6		100.0

Part II

	Undergraduate	Graduate	Non-student	Total	
Extremely poor	33	8	23	64	13.6
Very poor	35	9	23	67	14.3
Poor	80	10	32	122	26.0
Fair	117	24	41	182	38.7
Good	20	5	5	30	6.4
Very good	1		3	4	0.9
Extremely good		1		1	0.2
Total	286	57	127	470	
	60.9	12.1	27.9		100.0

Regardless of a slight shift in the response rate, respondents' knowledge of Ethiopia was very shallow. When asked about the best general description of Ethiopia the majority (52.7 per cent) indicated that the country was 'famine stricken', 20.0 per cent said it was 'poor', barely 0.2 per cent said it was a 'good' tourist destination. Table 7-38 shows that positive descriptors (historical, growth, cultural and touristic) received only 13.3 per cent of response.

Table 7-38
General Description of Ethiopia (#, %, n = 459)

	Undergraduate	Graduate	Non-student	Total	
Famine stricken	171	23	48	242	52.7
Poor	47	18	27	92	20.0
War ravaged	19	2	16	37	8.1
Unstable	17	3	7	27	5.9
Historical	3	8	12	23	5.0
Growing	15	1	6	22	4.8
Cultural	7	2	6	15	3.3
Tourist destination			1	1	0.2
Total	279	57	123	459	
	60.8	12.4	26.8		100.0

For the open-ended question, 'What three most important features do you consider essential for a tourist destination?' safety/stability was identified as the most important feature (118.1 per cent). As Table 7-39 shows, this is followed by

accommodation and tourist attractions (50.9 per cent and 49.1 per cent, respectively). Cultural diversity was mentioned by only 9.2 per cent.

Table 7-39
Features Essential for a Tourist Destination (% , n = 458)

	Undergraduate	Graduate	Non-student	Total
Safety/stability	74.9	17.5	25.8	118.1
Accommodation	32.3	4.8	13.8	50.9
Attractions	31.9	3.5	13.8	49.1
Transport	20.7	3.3	13.5	37.6
Shopping facility	13.3	3.3	7.4	24.0
Culture	6.3	1.3	1.5	9.2
Total	62.0	11.6	26.4	100.0

For the question that followed the above, ie. 'based on your opinion above, could you consider Ethiopia as a tourist destination?' As can be seen in Table 7-40, the number of "yes" responses was only 16.7 per cent in Part I while it was 54.4 per cent in Part II. The number of "no" responses was 46.2 per cent in Part I but only 23.5 per cent said "no" in Part II. Those who were not sure were 37.1 per cent in Part I and 22.1 per cent in Part II. This shows a shift in respondents' views of Ethiopia.

Table 7-40
Ethiopia Considered as a Tourist Destination (% , N = 455,480)

Part I

	Undergraduate	Graduate	Non-student	Total
Yes	9.2	1.3	6.2	16.7
No	29.2	5.1	11.9	46.2
Don't Know	23.3	5.3	8.6	37.1
Total	61.8	11.6	26.6	100.0

Part II

	Undergraduate	Graduate	Non-student	Total
Yes	33.8	6.9	13.8	54.4
No	11.9	3.3	8.3	23.5
Don't Know	15.4	1.9	4.8	22.1
Total	61.0	12.1	26.9	100.0

After viewing the video the question "What feature/s impressed you most?" was asked for which 63.0 per cent indicated landscape and scenery, 50.3 per cent indicated history, and 34.0 per cent mentioned wildlife. Infrastructure was rated least (3.8 per cent). Only 1.7 per cent indicated that none of the features presented impressed them. Table 7-41 shows the details.

Table 7-41
Impressed Features (#, % , N = 473)

	Undergraduate	Graduate	Non-student	Total	
Landscape/scenery	187	28	83	298	63.0
History	136	27	75	238	50.3
Wildlife	95	17	49	161	34.0
Culture	65	18	28	111	23.5
People	62	9	36	107	22.6
Art-facts	47	7	24	78	16.5
Infrastructure	13	2	3	18	3.8
None	6		2	8	1.7
Total	293	55	125	473	
	61.9	11.6	26.4		100.0

The country's image topped the list of areas needing improvement with 73.6 per cent of respondents while promotional activities and political stability also drew significant attention (36.1 per cent and 33.3 per cent, respectively). For the question, "In your opinion which areas need improvement?", banking facilities was mentioned by only 2.9 per cent. Table 7-42 shows that image, promotion, political stability, government policy as well as infrastructure require the attention of the authorities.

Of course this does not mean that other factors are not important, rather they could also be considered, but to a lesser degree.

Table 7-42
Areas Needing Improvement (#, % ,N =4 77)

	Undergraduate	Graduate	Non-student	Total	
Image	227	36	88	351	73.6
Promotion	101	24	47	172	36.1
Stability	88	16	55	159	33.3
Government policy	47	12	23	82	17.2
Infrastructure	42	13	13	68	14.3
Accommodation	28	7	6	41	8.6
Institution	13	5	4	22	4.6
Customs/visa	11	2	2	15	3.1
Banking facility	8	5	1	14	2.9
Total	293	57	127	477	
	61.4	11.9	26.6		100.0

For the question, 'How would you rate Ethiopia as a tourist destination on a seven-point scale?' from 1 "definitely no" to 7 "definitely yes" the mean result obtained was 3.90. As shown in Table 7-43. 49.2 per cent of respondents rated their knowledge of the country between 4 and 5, however, 60.9 per cent of responses fall between 1 and 4 which suggests that the rating is not favourable. Only 11.4 per cent were on the high side of the scale.

Table 7-43
Rating of Ethiopia (#, %, N = 480)

	Under-graduate	Graduate	Non-student	Total		Cumulative %
1 'definitely no'	9	3	11	23	4.8	6.8
2	44	6	21	71	14.8	19.6
3	54	13	28	95	19.8	39.4
4	67	19	17	103	21.5	60.9
5	95	7	31	133	27.7	88.6
6	21	7	12	40	8.3	96.9
7 'definitely yes'	4	3	8	15	3.1	100.0
Total	294	58	128	480		
	61.3	12.1	26.7		100.0	

'If you at a later date consider visiting Ethiopia, which other tourist destination would you include in your itinerary?' was another question for which Egypt received 72.3 per cent, followed by Kenya (38.9 per cent). Table 7-44 shows that South Africa, Zimbabwe and Botswana got a combined response rate of 31.8 per cent while Kenya and Tanzania got a combined response rate of 44.9 per cent. This is 27.4 per cent lower than a single response rate for Egypt (72.3 per cent). Egypt in this case is the most popular destination that could have an impact on Ethiopia's tourism.

Table 7-44
Destinations Included in Itinerary (#, % N = 470)

	Undergraduate	Graduate	Non-student	Total	
Egypt	225	39	76	340	72.3
Kenya	111	17	55	183	38.9
South Africa	53	15	31	99	21.1
Zimbabwe	53	5	30	88	18.7
Tanzania	15	3	10	28	6.0
Botswana	7	2	13	22	4.7
Total	287	58	125	470	
	61.1	12.3	26.6		100.0

'Would you pass on the knowledge you have gained of Ethiopia to others?' received a 65.6 per cent 'yes' while only 13.8 per cent said 'no'. Table 7-45 shows the result.

Table 7-45
Passing Knowledge Gained to Others (% , N = 479)

	Undergraduate	Graduate	Non-student	Total	
Yes	39.0	7.9	18.6	65.6	
No	8.8	1.3	3.8	13.8	
Don't know	13.4	2.9	4.4	20.7	
Total	61.2	12.1	26.7	100.0	

7.9 Curtin Alumni Members' Perception of Ethiopia as a Tourist Destination

Determining potential tourists' perception of Ethiopia as a tourist destination is of paramount importance. It gives the opportunity to focus on the most appropriate marketing strategy, target market/s and promotional mix. From a marketing point of view, perception refers to the way potential consumers interpret a new product (in this case tourist attractions), a package or an advertisement [Cohen 1988; Hawkins, Best and Coney 1989]. It is imperative that adequate research be carried out in order to elicit information about potential tourists' perception of Ethiopia as a destination. This could be in the form of whether potential tourists have heard of the destination; what the country's major tourist attractions are; what attitudes the potential tourists have towards the country as a tourist destination; given a list of possible destinations where they would rank the country, and how likely they are to visit the country in the future [Mill, 1990]. For example, in a survey to attract North American tourists to India, Ahmed and Krohn (1992:89) concluded that India must adopt the following seven steps. These include: (a) improving the image; (b) identifying target markets; (c) strategically locating tourist offices; (d) developing promotional themes; (e) correcting attitudinal problems; (f) improving product strategy , and (g) promoting India as a convention destination. Teye (1989:23) wrote that Third World destinations must promote their attributes which are perceived as positive by prospective tourists, while at the same time they must work to overcome their negative image.

This survey is therefore designed to determine the perception of Ethiopia as a tourist destination by a cross-section of the Australian population. 265 Curtin University Alumni Members were involved.

7.9.1 Methodology

Eighteen questions about various tourist features of Ethiopia were asked in a seven-point scale from "extremely negative" to "extremely positive". In addition eight

questions were asked regarding the participants' profiles. The questionnaires were distributed to Alumni members as an insert in the Alumni newsletter. 265 useable responses were received, many of which also provided very valuable comments (see Appendix B).

7.9.2 Results and Discussion

Table 7-46 gives the various ratings of the features. On the seven-point scale where 4 is the average none of the 18 features were rated 4 or more. The highest mean, 3.926, was given to wildlife while the lowest, 2.019, was given to political stability. Basically, political stability is an important feature in the development of tourism. Tourists are very sensitive about their safety. The respondents' perception of Ethiopia as politically unstable suggests that if they wish to travel in that part of the world, they would definitely avoid Ethiopia.

Table 7-46
Alumni Members Perception Of Ethiopia's Tourist Features

Features	No. Mentioning	Mean
Wildlife	257	3.92
Friendly people	259	3.84
Climate	260	3.71
'Value for money' destination	257	3.25
General tourist attractions	258	3.16
Relative cost of airfare	259	3.01
Availability of guided tours	259	2.85
Reliability of air services	259	2.83
Professionalism of hotels	257	2.80
Beaches	254	2.70
Suitable tourist accommodation	261	2.60
Cleanliness	259	2.55
Price of holiday	257	2.44
Shopping facilities	259	2.31
Reliability of domestic transport	257	2.28
Popularity of destination	259	2.17
Political stability	261	2.01

Participants were represented a cross-section of the Australian community. For example, Table 7-47 shows 36.6 per cent were from health and community services,

15.1 per cent were in public service and 25.7 per cent were from the professional sector.

Table 7-47
Respondents' Areas of expertise

	Number	Percent of Total
Health and community services	87	36.6%
Professionals	73	25.7%
Academic	48	20.2%
Public services	36	15.1%
Others	15	6.4%

Table 7-48 shows that 94 per cent (of 265 respondents) travelled overseas but only 1.9 per cent indicated they had been to Ethiopia. However, 51.7 per cent said that they were not sure if they would visit Ethiopia in the future. Of those who travelled overseas 58.4 per cent were male and 41.6 per cent were female.

Table 7-48
Travel Experience

OVERSEAS TRAVEL	Number	Percent
Yes	249	94.0%
No	16	6.0%
Total	265	100.0%
BEEEN TO ETHIOPIA		
Yes	5	1.9%
No	260	98.1%
Total	265	100.0%
INTEND TO VISIT ETHIOPIA IN THE FUTURE		
Yes	18	6.8%
No	87	32.8%
Not sure	137	51.7%
Never	23	8.7%
Total	265	100.0%

52.4 per cent have an income of \$40,000 or less. By far the highest group (29.1 per cent) falls within the \$30,001 and \$40,000 income range and a range between \$30,001 and \$50,000 accounted for 52.1 per cent of respondents. Table 7-49 shows the income group.

**Table 7-49
Income Group**

	Number	Percent
Less than - \$20,000	33	21.6%
\$20,001 - \$30,000	28	10.7%
\$30,001 - \$40,000	76	29.1%
\$40,001 - \$50,000	60	23.1%
\$50,001 - \$60,000	23	8.8%
\$60,001 - \$70,000	19	7.3%
More than - \$70,000+	22	8.4%
Total	261	100.0%

Over a third of the respondents (35.6 per cent) are aged between 41 and 50. The majority (60.1 per cent) are between 31 and 50 and no participant was below 20. As can be seen from Table 7-50, 46.0 per cent of the respondents are in the age groups between 21 and 40.

**Table 7-50
Age Group**

	Number	Percent
21-30 years	56	21.5%
31-40 years	64	24.5%
41-50 years	93	35.6%
51-60 years	36	13.8%
61 years or over	12	4.6%
Total	261	100.0%

58.2 per cent (152) were males while 41.8 per cent (109) were females. In general the respondents' profile indicates that the majority are male, between 41 and 50 years of age, earning between \$30,001 and \$40,000, and with overseas travel experience, not sure if they would intend to visit Ethiopia in the future.

7.10 The Perception of Ethiopia as a Tourist Destination: As Ethiopians in Australia See It

A number of surveys of the Australian general public, wholesale tour operators, academics, students and professional people were conducted during 1992 to gauge their perception of Ethiopia as a tourist destination. The country's political instability, recent drought, and civil war having been projected on the media for long, has helped a 'negative image' to develop in the minds of these people. As a result they do not see Ethiopia as a tourist destination; however, there is an indication that with an effective promotional strategy this negative perception will eventually change. In order to balance the assessment of the Australian community at large who have little or no knowledge about Ethiopia, a similar survey was conducted among Ethiopians living in Australia.

7.10.1 Methodology

Questionnaires with reply-paid, self-addressed envelopes were distributed to Ethiopians through their Community Associations. From the responses, the following analysis was made to understand the general pattern of their perception.

7.10.2 Results and Discussion

The profiles of respondents were: 53.9 per cent lived in Ethiopia for the first 16-25 years of their lives; 73.8 per cent have lived in Australia for less than 5 years; 52.3 per cent travelled overseas for 1-2 times in the last 5 years; 58.5 per cent have visited Ethiopia in the last 5 years; 34.8 per cent are students; 48.5 per cent are in the 20-29 year age group; 47.0 per cent are permanent residents; 51.5 per cent reside in Perth; 65.2 per cent are married, and 63.6 per cent are male. 61.5 per cent of all respondents indicated that they had lived in Ethiopia for 21 or more years while 73.8 per cent mentioned they have lived in Australia for less than 5 years. Table 7-51 shows that while the majority had lived for many years in Ethiopia, the percentage of Ethiopians who have lived in Australia for a long time is very low.

Table 7-51
Length of Years Lived (N = 65)

	In Ethiopia		In Australia	
<5 years	5	7.7%	48	73.8%
5-9 years	1	1.5%	7	10.8%
10-15 years	4	6.2%	8	12.3%
16-20 years	15	23.1%	1	1.5%
21-25 years	20	30.8%	1	1.5%
26-30 years	12	18.5%	-	-
>30 years	8	12.3%	-	-

Table 7-52 shows that 52.3 per cent of respondents travelled overseas in the last five years while 29.2 per cent never travelled. On the other hand, only 1.5 per cent travelled more than 6 times during the last five years. Travel experience is valuable in assessing a destination's images.

Table -52
Overseas Travel (N= 65)

	No Mentioning	% Mentioning
1-2 times	34	52.3
3-4 times	9	13.8
5-6 times	2	3.1
> 6 times	1	1.5
Not travelled at all	19	29.2

Of those who have returned to Ethiopia for a visit in the last five years the majority were married males who are permanent residents living in Perth. Table 7-53 shows that respondents in Sydney and Melbourne and those who were separated were not inclined to visit the country.

Table 7-53
Profile of Those Who Visited Ethiopia in the Last Five Years (N=38)

MARITAL STATUS	
Married	65.8%
Single	31.6%
Separated	2.6%
GENDER	
Male	57.9%
Female	42.1%
RESIDENCE STATUS	
Permanent	52.6%
Temporary	28.9%
Citizens	18.4%
CITY OF RESIDENCE	
Perth	50.0%
Adelaide	42.1%
Melbourne	5.3%
Sydney	2.6%

Table 7-54 shows that of the total respondents, 34.8 per cent were students while 18.2 per cent were unemployed. Only 9.1 per cent were engaged in educational activity. 10.6 per cent were engaged in self-employment or were working in the public service sector. Only 3.0 per cent were business persons.

Table 7-54
Occupation (N = 66)

	No Mentioning	% Mentioning
Student	23	34.8
Unemployed	12	18.2
Public service	7	10.6
Self employed	7	10.6
Education	6	9.1
Business	2	3.0
Other	9	13.6

Table 7-55 shows that 78.8 per cent of respondents indicated they are in the age group of 20-39 while those under 20 and over 40 were only 3.0 per cent. 81.8 per cent of the respondents were 39 years or under.

Table 7-55
Age groups (N = 66)

	No Mentioning	% Mentioning
Less than 20 years	2	3.0
20 - 29 years	32	48.5
30 - 39 years	20	30.3
40 - 49 years	10	15.2
50 - 59 years	2	3.0

Table 7-56 shows the marital status of respondents. 61.9 per cent of males and 70.8 per cent of females are married. Single males and females account for 33.3 per cent and 20.8 per cent, respectively. Only 4.8 per cent of males and 4.2 per cent of females were separated while 4.2 per cent of females were widowed.

Table 7-56
Marital Status (N = 66)

	Male	Female
Married	61.9	70.8
Single	33.3	20.8
Separated	4.8	4.2
Widowed	-	4.2
Total %	100.0	100.0

Asked to compare Ethiopia's facilities with those of Egypt, Kenya, Zimbabwe and Australia on a seven-point scale from 1 = "extremely poor" to 7 = "extremely good", the result based, on the cumulative average, is shown in Table 7-57.

Table 7-57
Comparison of Ethiopia's Facilities with:

	Egypt		Kenya		Zimbabwe		Australia	
	Mean	No.	Mean	No.	Mean	No.	Mean	No.
Hotels	4.35	53	4.56	50	4.78	47	3.08	61
Airports	4.09	52	4.66	50	5.16	43	3.03	61
Train facilities	2.60	51	3.76	41	3.57	40	2.18	61
City bus tours	3.62	53	4.18	49	3.80	40	2.55	60
National bus operators	3.84	51	4.18	49	4.26	41	2.78	56
Air facilities	5.61	54	5.96	51	6.02	46	4.33	63
Air charter	4.53	52	5.28	49	5.04	41	3.72	58
Car hire	4.13	51	4.36	49	4.24	41	2.72	61
Roads	3.30	52	3.85	48	3.97	41	2.23	63
Overall Rating	4.01		4.53		4.54		2.96	

Note: 1 = extremely poor; 2 = very poor; 3 = poor; 4 = average; 5 = good; 6 = very good; 7 = extremely good

The overall rating suggests that the country's facilities are not good enough in the African context and they are very poor compared with Australian facilities. The only good rating was on air facilities when compared with those of Egypt, Kenya and Zimbabwe. The country's airport was also favourably rated when compared with that of Zimbabwe. For the question, "Based on your experience, what would you see the most important development priority for the Ethiopian Tourism Commission?" 64.6 per cent of respondents indicated political stability. Table 7-58 shows that other considerations include government policy changes (10.8 per cent), and transport facilities 9.2 per cent.

Table 7-58
Development Priority (N = 65)

	% Mentioning	% Mentioning
Political stability	42	64.6
Government policy	7	10.8
Transport facility	6	9.2
Image	4	6.2
Promotional campaign	3	4.6
Infrastructure	3	4.6
Total	65	100.0

According to Table 7-59, 72.7 per cent of temporary residents, 64.5 per cent of permanent residents, and 60.9 per cent of citizens indicated that political stability is a development priority. Infrastructure was mentioned only by 9.7 per cent of permanent residents.

Table 7-59
Tourism Development Priority/Residence Status (N = 65)

Priority	Residence Status		
	Temporary	Permanent	Citizen
Political stability	72.7	64.5	60.9
Government policy	18.2	3.2	17.4
Transport	9.1	9.7	8.7
Image	-	6.5	8.7
Infrastructure	-	9.7	-
Promotion	-	6.5	4.3
Total %	100.0	100.0	100.0

Political stability is widely mentioned by both those who visited Ethiopia and those who have not visited Ethiopia in the past five years. Table 7-60 shows that 63.2 per cent of those who have visited Ethiopia in the last five years indicated political stability as the major issue to be addressed. 66.7 per cent of those who have not visited the country in the last five years also indicated the significance of political stability to tourism development.

Table 7-60
Tourism Development Priority / Visited Ethiopia (N = 65)

Priority	Been to Ethiopia	
	Yes	No
Political stability	63.2%	66.7%
Government policy	7.9	14.8
Transport	7.9	11.1
Image	7.9	3.7
Infrastructure	7.9	-
Promotion	5.3	3.7
Total %	100.0	100.0

100.0 per cent of business and 83.3 per cent of public service groups indicated political stability as a priority for tourism development. The self employed category rated least (28.6 per cent). Table 7-61 shows the details.

Table 7-61
Tourism Development Priority / Occupational Category (N = 65)

	Occupation						
	Self	Public Serv	Student	Unem-ployed	Busi	Educ	Other
Stability	28.6	83.3	56.5	75.0	100.0	66.7	77.8
Govt policy	-	16.7	17.4	8.3	-	16.7	-
Transport	28.6	-	13.0	8.3	-	-	-
Image	-	-	4.3	8.3	-	16.7	11.1
Infra	28.6	-	-	-	-	-	11.1
Promotion	14.3	-	8.7	-	-	-	-
Total %	100.0	100.0	100.0	100.0	100.0	100.0	100.0

As Table 7-62 shows, 100.0 per cent of respondents in the age group 50-59 years indicated political stability as top priority. On the other hand, only 50.0 per cent of those under 20 years and 40-49 years respectively mentioned political stability. 53.1 per cent of the 20-29 age group and 89.5 per cent of the 30-39 age group also indicated political stability as the priority.

Table 7-62
Tourism Development Priority / Age Group (N = 65)

	Age Groups (Years)				
	< 20	20 - 29	30 - 39	40 - 49	50 - 59
Political stability	50.0	53.1	89.5	50.0	100.00
Government policy	-	9.4	5.3	30.0	-
Transport	-	15.6	-	10.0	-
Image	-	6.3	5.3	10.0	-
Infrastructure	50.0	6.3	-	-	-
Promotion	-	9.4	-	-	-
Total %	100.0	100.0	100.0	100.00	100.0

Again, according to Table 7-63, 72.7 per cent of temporary residents, 64.5 per cent of permanent residents and 60.9 per cent of citizens indicated political stability must be a priority for tourism development.

Table 7-63
Tourism Development Priority/Residence Status (N = 65)

Priority	Residence Status		
	Temporary	Permanent	Citizen
Political stability	72.7	64.5	60.9
Government policy	18.2	3.2	17.4
Transport	9.1	9.7	8.7
Image	-	6.5	8.7
Infrastructure	-	9.7	-
Promotion	-	6.5	4.3
Total %	100.0	100.0	100.0

72.7 per cent of Perth residents, 61.1 per cent of Adelaide residents, and 50.0 per cent, respectively of Melbourne and Sydney residents indicated political stability as a tourism development priority (Table 7-64).

Table 7-64
Tourism Development Priority/Place Of Residence (N = 65)

	Place of Residence			
	Adelaide	Melbourne	Perth	Sydney
Political stability	61.1	50.0	72.7	50.0
Government policy	5.6	25.0	9.1	16.7
Transport	5.6	25.0	6.1	16.7
Image	16.7	-	3.0	-
Infrastructure	-	-	6.1	16.7
Promotion	11.1	-	3.0	-
Total %	100.0	100.0	100.0	100.0

73.8 per cent of married people and 66.7 per cent of those separated indicated political stability as a priority. As Table 7-65 shows, only 47.4 per cent of single respondents thought political stability a priority. On the other hand, 100 per cent of widowed respondents indicated change in government policy as a priority.

Table 7-65
Tourism Development Priority/Marital Status (N = 65)

	Marital Status			
	Single	Married	Separated	Widowed
Political stability	47.4	73.8	66.7	-
Government policy	15.8	7.1	-	100.0
Transport	15.8	7.1	-	-
Image	-	9.5	-	-
Infrastructure	5.3	2.4	33.3	-
Promotion	15.8	-	-	-
Total %	100.0	100.0	100.0	100.0

As Table 7-66 shows 68.3 per cent of males, as opposed to 58.3 per cent of females, indicated political stability as the first priority in tourism development. However, both genders highly desired political stability.

Table 7-66
Tourism Development Priority/Gender (N = 65)

	Gender	
	Male	Female
Political stability	68.3	58.3
Government policy	9.8	12.5
Transport	9.8	8.3
Image	4.9	8.3
Infrastructure	2.4	8.3
Promotion	4.9	4.2
Total %	100.0	100.0

Table 7-67 shows that 80.0 per cent of those who had lived in Ethiopia for less than five years indicated political stability as a priority as opposed to those who had lived there for 16-20 years (46.7 per cent). 62.5 per cent of those who had lived there for more than 30 years indicated political stability while those who had lived between 5-9 years unanimously elected change in government policy as a priority.

Table 7-67
Tourism Development Priority/Had Lived In Ethiopia (N = 65)

	Years in Ethiopia						
	<5	5-9	10-15	16-20	21-25	26-30	>30
Stability	80.0	-	50.0	46.7	75.0	75.0	62.5
Government policy	-	100.0	-	13.3	-	8.3	37.5
Transport	20.0	-	50.0	13.3	-	8.3	-
Image	-	-	-	13.3	5.0	8.3	-
Infrastructure	-	-	-	6.7	10.0	-	-
Promotion	-	-	-	6.7	10.0	-	-
Total %	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Table 7-68 shows that 100.0 per cent of those who have lived in Australia for 21-25 years indicated political stability as the top development priority as opposed to only 28.6 per cent of those who have been in Australia for 5-9 years. On the other hand, 100 per cent of those who have lived in Australia indicated change in image as top priority.

Table 7-68
Tourism Development Priority/Years Lived In Australia (N = 65)

	Years in Australia				
	<5	5-9	10-15	16-20	21-25
Stability	68.8	28.6	75.0	-	100.0
Government policy	10.4	28.6	-	-	-
Transport	6.3	28.6	12.5	-	-
Image	4.2	-	12.5	100.0	-
Infrastructure	6.3	-	-	-	-
Promotion	4.2	14.3	-	-	-
Total %	100.0	100.0	100.0	100.0	100.0

100.0 per cent of those who travelled overseas more than six times in the last five years indicated political stability as top tourism development priority [Table 7-69]..

Table 7-69
Tourism Development Priority/Overseas Travel (N=65)

	Overseas Travel (No. of times)				
	0	1-2	3-4	5-6	>6
Stability	63.2	67.6	55.6	50.0	100.0
Government policy	10.5	11.8	11.1	-	-
Transport	10.5	5.9	22.2	-	-
Image	10.5	2.9	-	50.0	-
Infrastructure	-	5.9	11.1	-	-
Promotion	5.3	5.9	-	-	-
Total %	100.0	100.0	100.0	100.0	100.0

7.11 Ethiopian Tourism Officials' View of the Country's Tourism Development

Tourism has had its ups and downs in Ethiopia. While the country's poor image is accountable for the decline in the industry, one should not dismiss as irrelevant the role governments play of its development. Underdeveloped countries are pre-occupied with other economic sectors and ignore tourism. Budgetary deficiency is one area where the governments' priorities are reflected. Coltman (1987:36) wrote,

... in underdeveloped countries a twofold problem exists. First the government's tax revenues are not high because of low per capita income of the general population, and second, most of that government revenue is needed to provide basic social services, leaving little for tourism development.

This is particularly true of the Ethiopian situation. According to data compiled from the country's annual budgets, it can be seen that between 1981 and 1990 on average, only 0.19 per cent of both the recurrent and capital budget was allocated to the tourism sector. For the same period national defence was allocated 41.5 per cent of the recurrent budget alone. Table 7-70 shows the comparison.

Table 7-70
National Budget Allocation 1981-1990
(Recurrent And Capital 10-Year Average %)

Sector	Allocation (%)
Defence	41.5
Agriculture	14.3
Mining	11.2
Transport and Communication	9.0
Education	7.7
Industry	7.1
Water resources	7.0
Internal security	6.0
Health	2.7
Labor and Social Affairs	2.1
Construction	2.0
General Services	1.9
Commerce	1.6
Financial Institutions	1.1
Relief	1.0
Compensation	0.5
Trade	0.3
Housing	0.3
Culture	0.2
Economic Development Study	0.2
Tourism	0.2
Others	14.6

As can be seen from Table 7-70, the tourism sector has effectively been relegated to the lowest position. Because of the centrally planned economic policy, there has not

been a significant private sector to boost the industry. It is also interesting to note that with per capita income of US\$114 (third from the bottom last countries, only preceding Cambodia and Mozambique) the country ranks 22nd in the world in defence allocation over GNP. Deguefe (1990:70) wrote, "Privatistion is a non-operative policy, ... there are few, if any, people capable of raising the necessary capital ... unless foreigners are allowed to participate ...". In contrast the Australian Government, for instance, is committed to assisting the tourist industry in realising its considerable potential, and to this end has provided substantial resources to the Western Australian Tourism Commission in order to attract and co-ordinate tourism development in W. A. [Ministry of Economic Development, 1990:37]. In Tanzania in the 1970s the Government committed to tourism investment amounts far greater than any commercial organization could have done with large government share in tourism sector investment being partly explained by hotel construction [Curry, 1990:143].

Against this background a survey was carried out to establish the significance of the tourism sector in Ethiopia.

7.11.1 Methodology

A short questionnaire was developed and despatched to the Ethiopian Tourism Commission in May 1992. Senior staff in the Commission and its autonomous departments were the targets. In order to facilitate the response international reply coupons were provided. Three were from the Commission's main office, two others from the National Hotels Corporation. One respondent did not specify his/her office. The respondents work in the capacities of advisory, departmental and services heads. Table 7-71 shows the number of participants and their positions in the Commission.

Table 7-71
Positions of Respondents

Position	Number Mentioning	% Mentioning
Departmental Head	3	60.0
Services Head	1	20.0
Adviser	1	20.0

Their work experience ranged between 12 years to 20 years. Two respondents (66.7 per cent) indicated their work experience was 10-14 years while only one respondent (33.3 per cent) indicated that he had 15-20 years experience.

7.11.2 Results and Discussion

To gain an insight into the significance of tourism to Ethiopia, a seven-point scale question (from "of little importance" to "extremely important") was asked. The mean of 5.83 suggested that the sector is very important to the country. One comment confirms this: 'presently it is of little importance. However, from now on its importance could grow'. As Table 7-72 shows four participants (66.7 per cent) indicated that tourism was extremely important to the country.

Table 7-72
Importance of Tourism

	Number Mentioning	% Mentioning
Extremely little importance	1	16.7
Little importance	1	16.7
Important	1	16.7
Very important	1	16.7
Extremely important	2	33.3

The contribution of tourism to the Gross National Product (GNP) was very little. An open-ended question, "What percentage of GNP will be attributed to tourism between 1991/92 and 1998/99?" received mixed responses. These were: (a) less than

one per cent for 1991/92; (b) only 6-8 per cent of GNP is allocated to capital budget. Out of 6-8 per cent very little will be allocated to tourism. It is hard to put it in a percentage; (c) data not available. However, one would guess that its contribution to the GNP of the country is far less than 1 per cent, and (d) data not available. My estimate is that it could contribute about 10 per cent by the end of 1999. The present contribution could be around 6-7 per cent. While tourism is represented at Commission level in the central government all respondents would like it to have it at Ministerial level. It was also revealed that a proposal has been submitted to make the Commission a Ministry. This is of paramount importance because in order for it to be 'heard' effectively the sector needs a ministerial position in the Cabinet where it can voice its programs at levels commensurate with other Ministries. For example, a separate study of Sub-Saharan African countries revealed that almost all respondents were ministries. [See Chapter 6.]

For the open-question, "In your opinion what type/types of tourism infrastructure do you think will receive priority attention in the next five years?" respondents highlighted hotel development as a top priority. This was followed by transportation infrastructure such as airports, roads, railways, etc. Other areas identified include (in order of priority) transport facilities (air, buses, etc), tour operation and travel agencies and tourism site development (ecology, wildlife). Asked about growth in the expected arrival rates for 1991/92 through 1995/96, responses were mixed. However, by averaging the rates the expected general trend is shown in Table 7-73:

Table 7-73
Expected Growth in Tourist Arrival Rates

Year	%
1991/92	2.00%
1992/93	2.17%
1993/94	2.50%
1994/95	2.83%
1995/96	3.00%

According to the above rates the weighted annual average rate of growth could be 2.50 per cent. However, two comments from respondents were worth noting. (a) the average annual growth rate for the period covering 1982-1991 is found to be 2 per cent. Assuming the growth (per cent) will remain the same, projections for 1992-1996 have been made, and (b) growth sluggish. Has been growing at 3 per cent per annum for the last 10 years. Growth will be the same as of the past 10 years. To the question, "In your opinion, which of the following factors have negatively affected the growth of tourism in the country?", internal unrest topped the list with a mean of 6.83 followed by famine (6.40) and political instability (6.20) on a seven-point scale from 1 "of little effect" to 7 "extreme effect". It was, however, ironic to note 'poor promotion' to be related at only 4.00 as there are no tourism promotion offices overseas. Table 7-74 shows that the growth of tourism has been affected by internal unrest, famine, political instability, negative image, poor economic policy, inadequate infrastructure and visa and customs formalities.

Table 7-74
Factors Affecting Tourism Growth

Factor	Mean
Internal unrest	6.83
Famine	6.40
Political instability	6.20
Negative image	5.33
Poor economic policy	5.00
Inadequate infrastructure	4.17
Visa and customs	4.17
Poor promotions	4.00
Undeveloped attractions	3.50
Unskilled manpower	2.83
Poor facilities	2.80
Structural deficiency	1.80
Inadequate tourism data	1.60

On the other hand, the Table shows that undeveloped attractions, unskilled manpower, poor facilities, structural deficiency and inadequate tourism data have little or no impact on tourism growth in the country. Table 7-75 shows the factor/impact matrix. Those factors that have extremely great impact on tourism growth include internal unrest, famine and political instability. Inadequate tourism data, on the other hand, has no impact on tourism growth in the country.

Table 7-75
Factor/Impact Matrix

Factors \ Impact Level	1	2	3	4	5	6	7
Internal unrest							x
Famine							x
Political instability							x
Negative image					x		
Poor economic policy					x		
Inadequate infrastructure				x			
Visa and customs				x			
Poor promotions				x			
Undeveloped attractions			x				
Unskilled manpower			x				
Poor facilities			x				
Structural deficiency		x					
Inadequate tourism data	x						

Keys: 1 = extremely little 2 = very little 3 = little 4 = some 5 = great 6 = very great 7 = extremely great

The impacts of internal unrest, famine, political instability as well as negative image have been stressed in separate surveys conducted in Australia and presented elsewhere in this Chapter. The Commission's own staff responses further strengthen the positions of the Australian participants' perceptions of the country as a tourist destination. To the question about the amount of the international promotion budget for 1991/92 and 1992/93, only two respondents showed that Birr 475,040 and Birr 1,136,840 (US\$ 229,488 and 307,826 respectively) had been allocated for the two years. As can be seen from Table 7-76, But the overall promotion budget for 1986/87 to 1990/91 showed a negative annual growth.

Table 7-76
Promotional Budget Allocations 1986/87-1990/91

Budget Year	Birr	US\$*	% Change
1986/87	591,000	285,507	-
1987/88	590,000	285,024	-0.17
1988/89	564,600	272,753	-4.30
1989/90	527,900	255,024	-6.50
1990/91	501,440	242,241	-5.01

*US\$1 = Birr 2.07

All respondents thought that tourism should not be developed by the Central Government alone. They had various reasons including the following: (a) there is no reason at all why the Government should develop tourism alone. The Government should set forth favourable policies and conditions that would encourage private participation in developing tourism. At the same time the Government should bear the task of building basic infrastructures that help develop the tourist areas i.e. roads, electricity, water, etc.; (b) the beneficiaries of the Industry and the public at large should be conscious of the importance of tourism and involve themselves in a coherent manner towards the development of tourism; (c) the Central Government should only formulate policies and give general guidelines. The major role should be played by private capital and regional administration' and (d) in the past

seventeen years, the Government has proved itself incapable of promoting and developing tourism. The Government should confine itself to matters of policy (macro) and the business of marketing of tourism (micro) should be left to the private sector.

Furthermore, respondents strongly supported regional (provincial) authorities be given the power to develop tourism. All six respondents answered "yes" to the question "Should provincial (regional) authorities be given the power to develop tourism?" Their reasons for this positive response were: (a) develop and protect tourist attractions. Create awareness among the population. Encourage the establishment of hotels and others. Encourage domestic tourism. Establish or help to establish tourism attractions; (b) if provincial authorities want to engage themselves where individuals are reluctant due to various reasons, I think regional authorities should have the option of carrying out the development by themselves as long as the project is backed by a feasibility study; (c) under the guidance of the Central Government; (d) from national to provincial levels committees shall be formed to create consciousness among the communities to develop attractions, infrastructures and execute other matters related to tourism; (e) they should manage tourist sites in their respective regions, play a role to develop tourism in their own regions, and (f) they should work out their own development policies on tourism in conformity with the central government's policy and promote and control the private tourist investors.

Asked about the likely impact of the newly introduced, ethnically based, map of Ethiopia on the development of tourism in the country, four responded "not sure" while one mentioned that it would have a "negative impact". Table 7-77 shows that none of the respondents mentioned "positive" impact or "no" impact at all.

Table 7-77
Impact Of Ethnically Based Map Of Ethiopia

	Number Mentioning	%
No impact	-	-
Positive impact	-	-
Negative impact	1	20.0
Not sure	4	80.0

For the question, "Given a scenario in which Eritrea goes independent, in your opinion, would there be any effect on the development of tourism in the rest of the country?" two respondents said "yes" while the remaining four said "no". Table 7-78 shows the result.

Table 7-78
**Effect Of Eritrea's Independence On Tourism
Development In Ethiopia**

	Number Mentioning	%
Yes	2	33.3
No	4	66.7

Asked to comment on the likely effects, respondents mentioned these:(a) Eritrea controls the sea, and sea tourism in all its varieties would not be accessible to Ethiopia as it used to be. We cannot advertise the two Ss any more - sea & sand. This would have a profound effect on our tourism.; (b) if Eritrea goes independent there will be a positive impact on the development of the economy in general and tourism in particular. We hope to see it happen as soon as possible, and (c) Eritreans will travel to Ethiopia as tourists. Tourists who will visit Eritrea will come to Ethiopia. We can cooperate with Eritrea in promotion and formulation of tour programs. They will have the Red Sea and the rest of Ethiopia can offer history, wildlife, and nature in general.

Asked whether the Ethiopian Tourism promotion slogan, "LAND OF 13 MONTHS OF SUNSHINE" has any appeal in countries generating tourists to Ethiopia, the mean response of 3.80 was achieved on a seven-point scale from 1 "No appeal" to 7 "great appeal". This means that the slogan may need to be changed to appeal to potential tourists. One respondent commented, "No survey has been done on this matter. To me it does not have any effect". Asked about any comments they would like to make, one respondent commented,

We are trying to develop tourism here from scratch. Whatever there was to our tourism has been destroyed during the last 17 years. To develop it - its infrastructure, its supply, and demand and changing the tourist image of Ethiopia favourably will take time and capital and a lot of advertising.

As has been indicated in the foregoing pages, the government needs to address the importance of tourism through various mechanisms. Appropriate budgetary allocations, organizational restructuring, promotions, policy formulation, private sector involvement, regional tourism offices, etc are all areas that need attention. The most frequently mentioned inhibitors to tourism development such as internal unrest, famine, political instability, poor image are crucial for the future growth of tourism. These and other lesser significant factors should be addressed in time. The tourism promotion slogan appears to be out-of-date and needs to be changed. The phrase "...13 months of sunshine" may have a negative connotation - probably relating to famine. The question of cooperation with Eritrea (if and when it becomes an independent country) has to be initiated as early as possible. The two countries can benefit greatly through joint promotion and operation of tourism.

7.12 Implications of the Findings of the Surveys

There is a clear indication about the effect of the country's image on tourism development. Ethiopia's image in the international scene must be changed immediately if the country is to benefit from international tourism. However, it

should be anticipated that a change of an image can be a slow process. Gartner and Shen (1992:51) cautioned, "touristic image(s) can change rapidly, but not all components of an area's image change equally". Nonetheless, potential tourists require only those destinations appearing to offer a satisfactory pay-off which can be attained within perceived constraints [Um and Crompton, 1992:24]. Political instability is unfavourable for a country that seeks to develop tourism. This must be changed through relentless efforts by those in the political attic. Promotional activities which hitherto have been lacking, have to be enhanced to convince tourist generating countries of the wealth of tourist products that Ethiopia offers. Regional development of tourism is one option for a country that cannot by itself provide adequate promotional materials because of limited resources. Kenya's safaris as well as the Egyptian pyramids can be featured along with Ethiopian obelisks or Lalibela or wildlife or bird-watching. All these call for goodwill on the part of the governments concerned.

As discussed above, Ethiopia must re-examine its tourism marketing strategies in order to tap the Australian markets. Foremost, the image of the country must be changed and rigorous promotional activities must take place. Opportunities are there to create a tourism circuit within the region with Zimbabwe, Tanzania, Kenya, and Egypt. In order to sell the products, an intensive inventory of the tourist products and their qualities is essential. The products must be competitive in both quality and price. Tour operators require sufficient promotional materials in order to 'sell' the country. These materials must be of high-quality and be presentable to discerning tourists. A formal link has to be created in order to provide information required by potential tourists. Weaknesses highlighted in the foregoing pages need to be addressed. Foremost is the negative image of the country. The media portrayal of famine stricken people has to be changed as no tourist would like to go to a country to see "starving", "hungry" or "destitute" people. Hughes (1990:16) correctly put:

The effects of such negative images on tourism development are detrimental. Tourists on vacation desire to get away from the drudgery of the routine...If they wanted to see poor people, they would have stayed at home and taken a short ride downtown across the tracks in their own cities. The visitors are not seeking to be made physically uncomfortable by sharing in deprivations or psychologically uncomfortable by observing it.

The country's major problem is the negative image it has in the outside world. Various tourist attractions would only be marketed with a vigorous image change campaign. Mill (1990:63) noted that people visit a destination based on the image they have of that destination. For example, according to *The World of Information* (1992:108), Kenya's tourism industry became vulnerable in 1989 when the USA advised its nationals not to go to Kenya after two Americans had been killed in an attack on a tourist bus and later after the July 1990 riots. Kenya's coast has lost European customers because of fears of cerebral malaria, AIDS and even cholera. Ahmed (1991:26) highlighted six steps necessary to correct such negative images including: (a) capitalising on positive images of component parts; (b) scheduling mega events; (c) conducting familiarisation tours; (d) using selective promotion; (e) bidding to host international travel and tourism conventions, and (f) taking advantage of a negative image. This suggests that an effective promotional campaign should be in place in order to convince potential tourists that the country provides distinct attractions. As identified by the respondents the landscape and scenery, history, wildlife as well as cultural activities should be given serious considerations. Lessons should be learned from other countries to create awareness through relentless promotional campaign in order to convince potential tourists. Moreover it is essential to note that people who have had overseas experience are more discerning in their demand for quality tourist products.

Once again, whatever is offered must be unique and of superior quality in order to stand the chance of winning over competition. For example, Boniface and Cooper (1987:134) wrote:

Ethiopia is of particular interest to cultural tourists as its heartland is an ancient Christian civilisation separated from its Moslem neighbours by high mountain barriers. Due to the altitude the climate of the highlands compares favourably with the excessive heat and humidity of the Red Sea coast lands. Attractions include the game reserves of the Rift Valley, Lake Tana, and the monasteries of Axum and Lalibela.

It would also be appropriate to focus on developing a regional tourism circuit for multi-destination tourism. Ethiopia may benefit from joining hands with Egypt, Kenya, Zimbabwe, etc which are already developed and well-known in Australia as tourist destinations. This strategy could be viable in light of respondents' preference elsewhere in similar study to combine tours to Ethiopia with those of Egypt and Kenya. To this end, the national carrier, Ethiopian Air Lines, with over 35 destinations in Africa, Middle East, Asia and Europe (Selamta, 1992:60-61) is able to play a major role. As has already been mentioned in this chapter, the country suffers from poor image due mainly to the political situation as well as drought that has prevailed in the country for so long. To effectively focus on target market group it is imperative that product quality and relevant standards be at the acceptable level. Although a clear cut conclusion cannot be drawn from the foregoing analysis due to the rather small sample, it nevertheless indicates that Ethiopians in Australia who participated in the survey are keen to see improvements in political stability, government policy, transport, image, infrastructure as well as promotion. Political stability features prominently.

Political stability and image were also important also in the other surveys in which tour wholesalers, Curtin Alumni members, marketing students, students and

community members, Ethiopian tourism officials as well as Sub-Saharan African countries were involved. Improvement in the concept of political stability is very important to develop and market tourism products. In general, the respondents perceive Ethiopia's facilities as unsatisfactory compared with those of Kenya, Egypt and Zimbabwe and with those in Australia, very poor. A similar survey conducted among tour wholesalers showed important trends, ie. compared with those of Kenya, Tanzania, Uganda, Egypt, Zimbabwe, Botswana, South Africa and Namibia, that Ethiopia's tourism potential was poor [see elsewhere in this Chapter]. Regardless of variations in residential status, gender, age, travel experience, etc respondents clearly indicated there was a need for changes in the system - political, government policy, image, etc.

7.13 Conclusion

The foregoing study is a bird's eye-view around which further in-depth research can be carried out. It is hoped that some light has been shed on Ethiopia's image as a tourist destination. The tourist authorities in Ethiopia need to focus on changing the perception of potential tourists through intensive and coordinated promotional campaigns. For this reason an aggressive marketing strategy is required. Gartner and Hunt (1987) suggested that perceptions non residents hold about the attributes of certain activities and attractions change slowly. Advertising, media accounts, conversations with acquaintances are all accepted as change agents. Telesmankosuta (1989:559) reiterated that a destination image is critical component of a destination's tourism product and a tourist's choice of a vacation destination is greatly influenced by his or her perception of it. The study showed that improvement is required in the country's image, political stability, promotions as well as government policy in order for Ethiopia to attract international tourists. Coupled with this effort the country should attempt to form a tourist circuit with neighbouring destinations - preferably with Egypt and Kenya. Relentless media campaigns are required to make potential tourist markets aware that Ethiopia is not

an 'undesirable' place after all. The message must clearly and genuinely show the country's attractions - its history, its culture, its arts, its people, its nature and wildlife. One way to promote the country is to hold international festivals or to invite tourism professionals, practitioners and journalists to the country and show them all the products. In particular articles written by tourism journalists could have a great influence. All this boils down to peace and security. If peace does not prevail in the country, no matter how much promotion is conducted, tourists will never come to Ethiopia.

A number of conclusions can be drawn. First of all, Australian tour wholesalers are not keen about African tourism in general and about Ethiopia in particular. This is due to the prevailing negative image portrayed by the media. A change of image is of paramount importance. Teye (1988a:351) reminded, "'Black listing' by tour operators and travel agents is swift. Once a tour operator cancels tours into a country, the recovery time stretches from months to years". Secondly, tour wholesalers have little knowledge about Ethiopia. They require promotional materials and are willing to 'sell' the country provided conditions improve. The burden rests with the Ethiopian Tourism Commission to show its interest and provide promotional materials to the operators. Kale and Weir (1986:6, 1989:23) indicated, "...Third World destinations must provide their attributes which are perceived as positive by prospective tourists, while at the same time they must work to overcome their negative images". They further suggested that those responsible should develop a better promotional program to make potential tourists aware of all that they have to offer. Thirdly, international promotion an expensive business hence there is a need to pool the resources of neighbouring tourist destinations to promote the region in a concerted manner as in the Caribbean. For example, Teye (1988b:234) wrote "...the Caribbean Tourism Association's (CTA) ability to transcend historical, cultural and other differences in the Caribbean underscore the

fact that there is strong potential for effective regional cooperation in Africa". Buckley and Witt (1990:17-18) advised,

Short term strategies for increasing international tourist flows include improved marketing and promotion of the attractions... Long term strategies depending on improvements in the environment for tourists, including freedom of movement and exchange problems, and upgrading the quality of tourist products such as accommodations, catering, entertainment, and amenities.

Ethiopia is required to change its negative image, to ensure political stability, to provide wholesale tour operators with adequate promotional materials, to vigorously campaign for the formation of a tourist circuit with its neighbouring destinations. Promotion of materials most desired by tour operators include: (a) general information about the country; (b) brochures, posters, displays, pictures, fliers, etc.' and (c) videos, slides, TV ads. In general, there is a willingness on the part of the Australian tour wholesalers to 'sell' Ethiopia as a tourist destination, provided the above bottlenecks are sorted out. It is up to the Ethiopian tourism authorities to capitalise on this goodwill.

This survey showed that a destination's image is of paramount importance in order to effectively market its tourism products. A comment by one of the respondents clearly showed the image problem: "Tourism will increase Ethiopia's national income, but some may be disturbed by having lavish accommodation & food consumption while the population is starving, 'a moral dilemma'". Ethiopia needs to properly promote not only the products but also to show to the outside world that its negative image has changed. Promotion is particularly important in tourism because tourism is intangible service and that the primary goal in promoting a destination is to project images of the destination to potential tourists so it becomes desirable to them [Fakeye and Crompton, 1991:10]. Britton (1979:326) reiterated:

There is ample room for the creation and dissemination of promotional material that neither alienates the prospective visitor with oppressive visions of misery nor pretends to depict an air-conditioned utopia, but shows inconvoluted landscapes and the efforts and hopes of people at work or their economic and social development.

In this way potential tourists can be convinced that it is worth a place to visit. However, as repeatedly indicated, improvement of the image, political stability and rigorous promotions must not be left to take their own course. The country's landscape, scenery, wildlife and history would only be 'sellable' when the government effectively promotes them. Tourist circuits within the region would also be advantageous. Egypt and Kenya featured prominently as the likely destinations potential tourists would combine with Ethiopia. This is an important indicator that the Ethiopian Tourism Commission should not take lightly.

The respondents' comments suggested that Ethiopia was not a desirable tourist destination due to political instability, famine, poor marketing, inaccessibility, etc. The comments can create a benchmark on which the Ethiopian tourism authorities could base their image enhancement strategy. A destination cannot sell its attractions unless potential tourists are convinced that peace, stability and general favourable atmosphere is prevailing. It can be said that Ethiopia's image has greatly affected its potential for tourist destination. Tourism authorities' focus should be on how to change this negative image. Once this obstacle is removed through relentless campaigns then a choice of market will follow. Ethiopia provides an ideal example of an extreme situation. Many critical success factors (CSF) have to be implemented for the destination to be considered "hierarchy of factors".

Results of the survey suggest that the Ethiopian Tourism Commission has an enormously difficult task ahead to promote Ethiopia as a tourist destination. The task of improving hotels and associated facilities is the responsibility of the

Commission. However, others areas such as roads, transport, etc. generally fall under the jurisdiction of other departments. Close cooperation between these various departments is very important. Political improvement and change of the image of the country is the task that must not be left to the course of time. Immediate measures are desirable. This survey proved one thing: both Ethiopians as well as Australians see Ethiopia as an undesirable destination if the government does not improve its image, if it does not ensure political stability and if it does not improve its policies on tourism and if it does not improve infrastructure.

Respondents clearly indicated that a negative image, political instability, civil war, famine as well as poor budgetary allocations affected the development of tourism in the country. These problems should be addressed as soon as possible. As suggested by the respondents, restructuring the Commission is overdue and must be at ministerial level. This restructure should also create a conducive environment for regional administrations to develop tourism in their respective jurisdiction - within the national tourism development policy guidelines. A survey among tourist generating countries about the tourism promotion slogan "13 months of sunshine" should be conducted and a more appropriate slogan be adopted. However, it should be noted that with poor responses to inquiries, the senior staff in the Ethiopian Tourism Commission do harm to the very foundations of building a realistic tourism strategy. Poor responses would indicate their disinterest in whatever studies are being carried out. The officials in many instances failed to respond to inquiries or failed to supply with necessary information. This negative attitude must be changed and they should be more responsive. Otherwise, it is mockery to talk about tourism development in the country.

CHAPTER 8

STRATEGIC ANALYSIS

8.1 Introduction

This research has shown that there has never been a strategic approach adopted by the Ethiopia Government to Tourism. There is no existing strategic plan in place. In this chapter an analysis of the strategic situation is made, a situation audit of the Ethiopian tourism is conducted and key success factors are identified. To begin with, it is important to understand the meaning of a strategy. "A strategy is the pattern or plan that integrates an organization's major goals, policies, and action sequences into a cohesive whole ... Strategies normally exist at many different levels in any large organization." [Mintzberg and Quinn, 1991:5]. There are no clear-cut definitions for strategy. The following definitions, for example, can be used effectively in varied circumstances: (a) "those policies and key decisions adopted by management that have major impacts on financial performance. These policies and decisions usually involve significant resource commitments and are not easily reversible" [Buzzell and Gale, 1990:5], (b) "a strategy is the framework which guides those choices that determine the nature and direction of an organization" [Tregore and Zimmerman, 1990:5], and (c) "to identify the key factors that dictate ... direction of an organization together with the process that the CEO ... uses to set direction [Robert, 1990:5].

Teece (1990:40) indicated that strategy formulation includes identifying an organization's competitive strengths and weaknesses, determining the firm's external opportunities and threats, establishing operational goals aligned with value creation, developing and analyzing alternative strategic paths, and selecting among them. Schoemaker (1992:80) wrote,

By focusing the strategic vision on core capabilities needed in various possible futures and multiple strategic segments, synergies can be developed that give rise to surplus returns. ... these capabilities must not be easily transferred, for example, by a competitor merely hiring away a key employee. ... A firm's strategic vision essentially boils down to a bet on some perceived future or futures.

A strategy may be generic or mixed. Miller (1992:40) suggested conditions in which either a generic or single strategy could be of benefit. According to Miller, "strategic specialisation may be necessary when multiple strategies are incompatible". Such conditions may occur when customers demand extreme reliability. On the other hand, the merits of mixed strategies are outlined by Miller (1992:40-41) as in the following cases: (a) when customers are concerned about many aspects of a product (eg., price, quality, style, and features); (b) when competitors find it easy to imitate pure strategies (eg., when barriers to entry are low, economies of scale or of learning are minimal, and there is little patent protection); (c) when there is no conflict in achieving different aspects of the strategy (eg., between achieving high quality or attractiveness and low price); (d) when fluctuating customer preferences and rival offerings demand a broader range of skills; (e) when the firm has become too narrowly focused around a single aspect of strategy and requires more openness and heterogeneity to ward off stagnation, (f) when industries are relatively mature and differentiation by innovative products or economical processes is more difficult.

Miller (1992:41) advised that managers "must seek whenever possible the synergies, robustness, and greater flexibility of mixed strategies". McNamee (1992:2) reiterated that strategic management is concerned with "long-run, fundamental and often irreversible decisions about the company's mission, scale of operations and spread of activities." A successful strategy, says McNamee, has five characteristics which include time scale, scope, reversibility, level, and importance.

8.2 Strategy Development In Tourism

Ahmed (1986:13) stated that strategic planning decisions will determine what types of tourists are re-attracted, how fast the industry grows, and what methods may be most appropriate to increase revenue from tourism. Kaynak, Odabasi and Kavas (n.d:46-47) wrote,

The strategic planning for tourism firms in developing countries and the necessary activities takes place within a highly dynamic environment, Precisely which strategy or combination of strategies will be adopted depends upon the specific circumstances of the service company and its resources, as well as the corporate and marketing objectives.

Wilson (1972:47) suggested that besides segmentation, marketing and service mix, various factors should also be considered in order to adopt a meaningful strategy. These, as shown in Table 8-1 include customers, the environment, competition, marketing decisions, market responses and resource variables. Each of these variables has a significant impact on marketing development. For example, customers can impact on strategy development because their size, purchasing power, socio-economic characteristics, etc influence their motives to travel. Environmental variables such as social trends and government activities (as facilitators or regulators) may also have an impact. Competitive variables indicate the various competing destinations which offer similar or alternative attractions. In general, each of the variables mentioned must be assessed individually as well as in relation to each other when developing a tourism strategy.

Table 8-1
Variables for a Strategy Development

Variables	Explanation
Customer variables	The number of tourists in the market, their purchases, motives, needs, attitudes, socio-economic characteristics and purchasing habits.
Environmental variables	Economic activity, social trends and government activities.
Competitive variables	Policies of other tourism firms offering similar and substitute services.
Marketing decision variables	Any factor under the control of the tourism firms which can be used to stimulate the firm's sales. These could include the mix of services offered and the communication mix.
Market response variables	Division of the tourism firm's marketing efforts among its services, customers, segments and sales areas.
Market response variable	Behaviour of sales in response to alternative levels, allocations and mixes of marketing effort.
Resource variables	Availability of resources - personnel, finance, equipment and facilities.

Lamb (1988:360) indicated that there exists a critical need for a national strategy for tourism development in Australia. He wrote that without careful strategic planning, indiscriminate tourism marketing may indeed generate short-term tourism traffic to and within Australia. But the level of repeat business will be low and the long term growth potential will be limited. Responsible planning within a strategic framework will ensure qualitative and quantitative supply of the product and a sensitive use of resources. Such a national strategy would encourage a heightened sensitivity to the complex economic, social, environmental and cultural issues that arise as a result of the growth of tourism. Lee (1987:87) suggested that while the place of tourism in developing countries varies considerably, each country can offer its own unique tourism product. He further suggested that in a framework of an integrated sectoral approach, these developing countries could be assisted by the European Economic Commission in developing their strategies through financial and technical assistance.

Papadopoulos's (1989b:302) study of the Greek tourism marketing strategy found that emphasis is placed on reconciling NTOG [National Tourist Organization of Greece] internal capabilities (strengths and weaknesses) with the environmental constraints (threats and opportunities) in order to take advantage of strategic windows. He indicated that Greek tourist strategy in Europe is concentrated on the areas in which Greek tourism has an advantage (eg, antiquities) over competitor and upon new forms of tourism (eg, sports, winter and conference tourism, and concluded that the adoption of a strategic, interdisciplinary and integrated tourism marketing planning process is necessary.

Gibbons and Fish (1988:166) in their study of Thailand's strategic problem of encouraging tourists to stay longer and spend more concluded that a strategy that would increase the stay of those whose per person per day expenditure is above average, would be to encourage tourists from Japan, USA., Australia and Saudi Arabia to visit and stay longer. In order to meet the challenges of competition among travel destinations, Nova Scotia focused on a development strategy which comprised programs broken down into two groupings: programs required to establish a basic framework of physical facilities, and supportive programs to the framework of physical facilities [Rodger, 1975:13,15]. Rodger (1975:13-14) classified the above programs as:

1. Physical facilities

Recreational land: the acquisition, consolidation and allocation of lands for recreational uses, as well as the introduction of land use controls. -

Resort complexes: as perhaps the key element of the strategy, tourism/recreation complexes would be relatively autonomous from local communities in that they concentrate visitors outside of existing communities in order to minimize potentially disruptive

effects on the communities, yet provide jobs and recreation opportunities to residents of the immediate area. -

Resort communities: As these capitalise on natural, historical or cultural assets by developing accommodation and amenities that keep with the theme and the scale of the attraction and of the community itself, initiative for the development of such communities stems from the community itself.

Major attractions: Complementary to resort complexes, these attractions of major significance which hold visitors for a sufficient length of time require accommodation and other services.

Tourist travel ways: A series of inter-connecting tourist travel ways allowing a circuit flow of tourists and creating the needed access to the parks, attractions, activities, resort communities, resort complexes and recreation areas.

2. Supportive programs

Environment: The need for a regulation which would prohibit the utilisation of land in the vicinity of a recreation area from being changed in a way that would detract from development.

Promotion: The advertising and promotion program must be integrated with the tourist recreation and facilities development program.

Planning: Planning and technical capability is required to prepare concepts of tourist and recreation projects and provide guidance to community

and private groups for the development of long range plans for tourist development.

Training: Training programs must be laid down for personnel that work in accommodation, travel, tour operation areas.

Tourist information: In addition to travel information bureaus, major reception centres should be established to provide interpretative facilities that will point out the recreational, scenic, historical, cultural and industrial attractions.

Tourist destinations are at the mercy of tourists. If the image of a destination is tarnished, it takes a long time and the impact of resources to re-establish their position in the market. A study conducted by Ahmed and Krohn (1992:91) about North American tourists to India indicated that in order to capture this segment, the Indian tourism industry must change its strategy and focus on: improving the image; identifying the target market; strategically locating tourist offices; developing promotional themes; correcting attitudinal problems; improving product strategy, and promoting India as a convention destination. Another study on India undertaken by Kale and Weir (1986:6) indicated that many Third World countries endowed with culture, a lifestyle, and an historical heritage require a sound marketing strategy that invests in overseas market research to enable them to design a more appropriate marketing strategy for their tourism. Brown (1988:341) indicated that the Indian Department of Tourism designed the strategy to counter India's history-orientated image and to promote tourism throughout the year to direct more tourists to lesser-known areas with budget tourists using low-cost means of transport to visit villages. Strategies can take the form of short-term and long-term.

In a study about the USSR, Buckley and Witt (1990:17-18) concluded that short-term strategies for increasing international tourist flows would improve marketing and promotion of the attractions, while long-term strategies would depend on improvements in the environment for tourists, including freedom of movement and exchange problems, and the upgrading the quality of tourist products such as accommodation, catering, entertainment, and amenities. Singapore, on the other hand, requires three different strategies to maintain the growth of its tourist arrivals. Cheong and Khan (1988:40,42) identified the three strategies as: market expansion, to direct the country's promotional efforts at other markets to reduce dependence on the traditional tourist-generating Asian region; the development of South-East Asian specialised markets, and marketing Singapore as an international convention destination. In general, the development of a tourism strategy calls for detailed analysis of both external and internal environments that impact upon the organization's performances. The strategic analysis that has been taken starts with the environmental analysis for both the internal and external environments. The external environment refers to an environment over which an organization has no control, for example, competitors, suppliers, the government, technology, potential tourists, all form part of an external environment. Within this external environment, there are those that can directly impact on the organization while others may not have a direct impact. Those that have a direct impact are referred to as 'stake holders' and this section will focus on these stake holders at a later stage in this section.

8.3 Environmental Scanning

This section will focus on the external environments such as political, economic, geographic, technological that impact on tourism. Strategic planning and management in tourism take place within a highly dynamic environment. Environmental analysis is an awareness of the environment, and has an immediate objective in tourism development. [Witt and Moutinho,1989:xiv; Prentice,

1989:130]. The growth of tourism development has brought with it a wide variety of impacts ranging from those which are economic and/or socio-cultural in character, to those which are ecological in nature [Williams, 1987:385]. Weichard (1992:173) wrote that no business operates in isolation as there are many external, uncontrollable, conditions such as political, economic, legal, competitive, and socio-cultural, environments which affect all businesses.

An analysis and understanding of these environmental forces is an essential step in planning a strategy to gain an insight into (1) a perspective on current and future trends, (2) present and future problems, and (3) objectives and goals. Environmental scanning can take into account economic, political, social, technological, competitive and geographic factors. Economic factors can look into the world recession, the increasing costs of living, standards of living, disposable income, war economy, poor investment. Political factors may include political stability, the country's image, politically motivated incidents such as air piracy, kidnapping and killing of tourists, civil war and unrest, ethnic conflicts, disintegration of the country, political organizations, ethnically based government administrative structure, lay-offs, transfers and re-entrenchments, exodus of skilled manpower. Social factors may focus on the ageing population in the industrialised tourist-generating countries, high disposable income, changing life style, family value, work and business attitudes, extended leisure time, mobility, education. Technological factors are technological changes, advancement in transport systems, the quality of service, variety of products, ease of communication, home movies. Competitive factors may include the size of competition, competitor's strategies, number of competitors, location, market segments, promotional strategy, ease of entry into and/or exit from market, type of marketing strategy. Geographic factors may include proximity to major markets, location of tourist attractions, accessibility by sea, international air carriers, infrastructure.

The above mentioned factors can be threats to or opportunities for Ethiopia's tourism growth depending on the way the industry is set to perform. Table 8-2 and the extrapolated Figure 8-1 show environmental threats and opportunity profiles. Both threats and opportunities are measured from 0 to 10 where 0 shows minimum threat/opportunity while 10 shows maximum threat/opportunity. Each of the factors cause threats to or create opportunities for tourism development in the country. The degree of impact varies from factor to factor. For example, economic development would have a very high impact, thus a rate of 8. On the other hand, its threat to the tourism development would be about 4. Likewise political instability would have a very negative impact (9) but would contribute only minimally (2) for opportunity. All the factors shown on Table 8-2 and then extrapolated on Figure 8-1 have been based on a ten-point scaling. These matrices were based on discussions held and interviews made during fieldwork in Ethiopia with senior tourism officials; tour operators; airlines, international organizations and government departments.

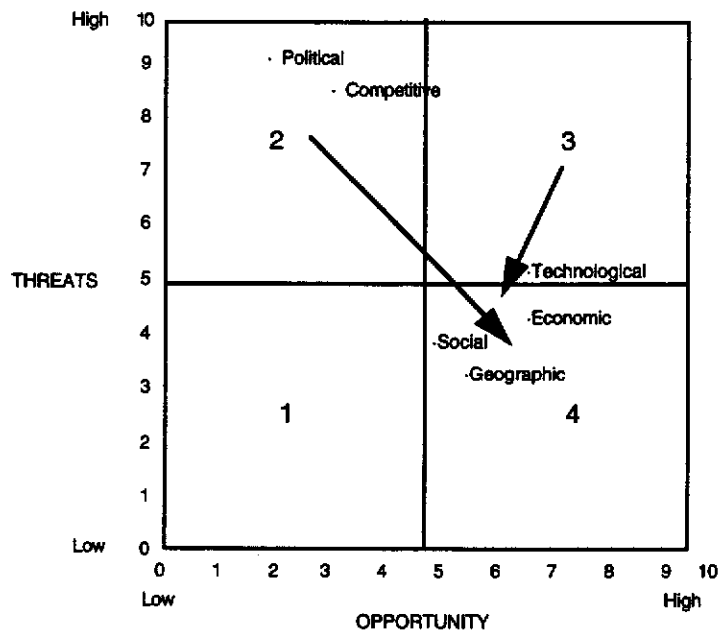
Table 8-2
Environmental Threat and Opportunity Profile

Factors	Opportunity of Factor	Threat
Economic	8	4
Political	2	9
Social	5	4
Technological	8	5
Competitive	4	9
Geographic	6	4

The values in Table 8-2 are extrapolated to Figure 8-1 to show the threats and opportunities and to suggest possible direction of movement to avert the threats and to capitalise on the opportunities. Figure 8-1 shows that unstable political condition can adversely affect tourism development by hindering any opportunities that may help the industry. Likewise geographic proximity would have a high opportunity for tourism growth and would have low threat For example, closeness to major tourist

generating regions would have a great opportunity whereas closeness to popular tourist destination could be a threat..

Figure 8-1
Environmental Threat and Opportunity Matrix



Major threats for the country are political and competitive in nature. Attempts should be made to convert these threats to opportunities. This means that every effort should be made to move away from quadrants 2 and 3 to quadrant 4 where the maximum opportunity with minimum threat exists. This can be done only when the government ensures political stability and shows to the outside world that such stability exists in reality. Moreover the governments commitment to develop tourism must be shown.

8.4 Stake holder Analysis

Ackoff (1981:30) stated that "stake holders are all those inside or outside an organization who are directly affected by what it does". Ackoff (31) identified six types of exchanges in which an organization engages while dealing with the stake

holders. Table 8-3 shows that while employees are basically rewarded with remuneration, customers look at the money they pay. Governments provide services for which they may charge, while at the same time issuing regulations for another working environment.

**Table 8-3
Stake holders Exchange Mode**

Stake holders	Types of Exchange
Employees	Money for work
Suppliers	Money for goods and services
Customers	Goods and services for money
Investors and Lenders	Money
Debtors	Money
Government	Money for goods, services and regulation

Ackoff (83) pinpointed areas of concern for an organization that need to be addressed with such questions as:(a) who the organization's stake holders are; (b) how many of each type there are; (c) how dependent on the organization they are; (d) how dependent the organization is on them; (e) with respect to consumers or customers, how they use the organization's output and for what purposes, and (f) what the distribution of economic, demographic, and personality characteristics is among them. An organization needs to address these questions in order to determine who its stake holders are and what strategies are required in order to meet their demands. Viewed as an entity, the organization is seen to have such a responsibility to all of its stake holder and to society, the larger system of which it is a part. [Ackoff, 1981:49]. Pearce II and Robinson Jr (1991:16) indicated that "stake holders are influential individuals and groups that are vitally interested in the actions of the business. The authors suggest that strategic managers must recognise the legitimate rights of the firm's claimants: stockholders, employees, customers, suppliers, governments, unions, competitors, local communities, and the general public. Pearce II and Robinson Jr (66) further reiterated that when a firm attempts to

incorporate the interests of these groups into its mission statement, the following steps must be taken: (a) identification of the stake holders; (b) understanding the stake holders' specific claims vis-a-vis the firm; (c) reconciliation of these claims and assignment of priorities to them, and (d) coordination of the claims with other elements of the company mission. Dyson (1990:13,19) showed that stake holder's views are diverse and present conflicting objectives. As Table 8-4 shows, while employees may be interested in higher pay, more benefits and job security, governments may be interested in more tax revenue or enforcement of the laws. Communities may be interested in pollution-free environment while suppliers may be interested in selling their products.

Table 8-4
Stake holders Objectives

Stake holders	Objectives
Employees	Higher pay, more benefits, job security
Consumers	Safe and reliable products, reasonable price
Suppliers	Assurance that their products are purchased
Stockholders	High return on investment, security of their money
Governments	Taxes, compliance with the laws
Community	'Good citizens', job provision, minimum pollution

A stake holder can therefore be defined as "anyone whose actions can affect an organization or who is affected by the organization's actions". Argenti (1989:81) rejects the idea of the stake holder theory which states that "organizations do, and should, benefit a wide range of people", rather they (the organizations) should aim to satisfy only a small number of beneficiaries. Argenti bases his reasons for rejection of the theory on the following: (a) organizations do not behave like this in real life; (b) there are no rules to determine who is a legitimate stake holder and who is not, (c) there are no rules by which a company can approve or reject any demand from

any other people. Huff (1990:166), however, indicated that “a new strategy must be communicated to a variety of stake holders: employees, stockholders, the financial community, and even the competitors”. Most stake holders have a more distant and simplified view of past strategy than the central executive group and are less aware of the stress and strain that preceded the need for strategic change. Stake holders must be appraised of the company's new direction and shown that inadequacies of the old strategy can be overcome by the capabilities of the new. Browman and Asch (1987:24-25) indicated that stake holders benefit in a variety of ways. Extensive discussions held in the field work suggested that various stake holders expect that tourism development in the country can benefit in different ways. As Table 8-5 shows, job creation, preservation of natural environment, culture, and man-made attractions, revenue, and economic growth are a few of the benefits that can be derived from tourism development in Ethiopia.

Table 8-5
Stake holders Benefits

Stake holder	Rewards
Employees	Wages, job satisfaction, etc
Society at large	No pollution, 'good works'
Government	Tax and rate income to enable them to do 'good works'
Managers	Salaries, status, responsibility, challenge, perks, etc
Consumers	Useful, desirable products
Shareholders	Dividends, capital growth
Loan Financiers	Interest

Therefore, as long as every stake holder group is satisfied with the relationship between its contribution to tourism development and its rewards, the stake holder coalition carries out its social and economic purpose. However, one of the problems

raised by the stake holder theory is how tourism development authorities cope with multiple objectives of different stake holder groups. Taylor and Hussey (1982:126) indicated "the stake holders theory suggests that a firm has obligations not only to shareholders and customers but to all the individuals and organizations with which it has transactions and relationships: (a) suppliers of raw materials, components and services; (b) employees, leaders of trade unions and professional associations; (c) private shareholders, institutional investors and banks; (d) private and industrial customers; (e) distributors, agents, wholesalers and retailers; (f) competitors and collaborators in the same industry; (g) public servants in local and national government, and (h) members of the communities in which the company's offices and factories are located. This view is that management cannot afford to focus their attention on satisfying the needs of the customers, or meeting the demands of the shareholders, whilst ignoring the claims of other powerful groups.

A prudent management team is aware that all of the stake holders have the power to damage or help the business. In effect, management is recognising that corporate strategy is concerned not simply with producing a return on the shareholders' capital and delivering satisfactory products to customers, but also achieving social acceptance in the community, ensuring a continuing and uninterrupted supply of key new materials and components, influencing government policies, and of course ensuring that the work force and the whole management team are motivated and committed to the company and its policies. The 'stake holder approach' suggests that management should be searching for a set of policies for research, production, marketing, finance, personnel and 'public affairs' which are compatible with each other and which manage to satisfy the minimum requirements of the stake holder groups, giving priority to those interests which for various reasons, seem to merit more attention than the rest. Grant (1988:8) indicated that "corporate-level resource base certainly establishes some initial expectations, but these are often tempered over time by the aspirations of various stake holder constituencies, eg., investors, labor

unions, consumer groups, local politicians, etc. "When an organization perceives itself to be in a power disequilibrium, its strategy will focus on currying favour and conforming to the requirements of the more powerful stake holders" [Grant, 1988:364]. Hax and Majluf (1984:35) indicated that the present day competitive environment is attributed to "more militant attitudes from different groups in society which are commonly named group stake holders which include, not only shareholders, debt holders, clients, suppliers, managers, and other personnel, but also the government, the community, and all groups that are bound to affect or be affected, in some way, by the direction of the firm, like the environment, consumers, and others'. Friend and Hickling (1987:270) indicated that stake holder groups are those directly impacted by the decisions, such as residents, consumers, or employees. Ginter and Associates (1991:40) showed that there are advantages and disadvantages in stake holder analysis. These are shown in Table 8-6.

Table 8-6
Advantages and Disadvantages in Stake holder Analysis

Advantages	<p>Considers interdependent groups and individuals, Ensures major needs and wants of outside organisations are taken into account</p>
Disadvantages	<p>Emerging issues generated by other organisations may not be considered It does not consider the broader issues of the general environment.</p>

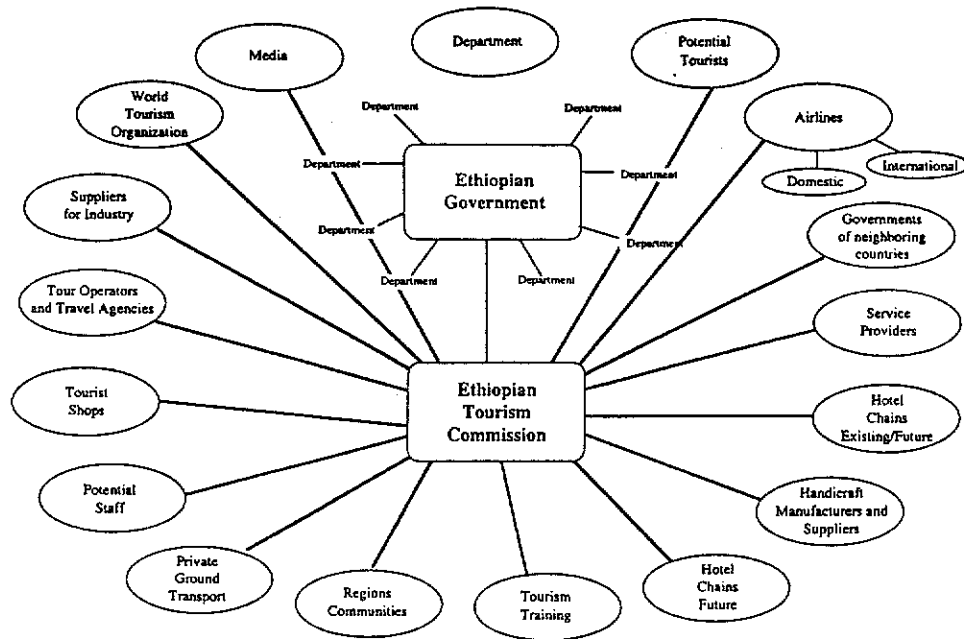
Payne (1991:8) warned that there are pitfalls in the ways information is handled for the stake holders. He insists:

The combination of excessive attribution errors in the reception of stake holder information, self-presentation tendencies in the transmittal of information to stake holder, and defensive communication routines among stake holder surely present serious

obstacles to more sophisticated and effective stake holder analysis, issues management, and resultant strategic planning.

Payne (10) adds that many stake holder perspective might not normally be thought or shared without the construction of special forums that encourage very open, fluid inquiry. Such forums might seek to reduce natural tendencies found in organizations for strategic self-presentations, self-serving and other common attribution errors, and resulting defensive communication routines. Maranville (1989:58) reiterated that some of the stake holders are influenced by, or influence, an organization through a variety of "gatekeepers" such as unions, Boards of Directors, environmentalists, the community, etc. A gatekeeper is a formal body that interacts on behalf of its members. Hanly (1992:896,907) indicated that the stake holder theory recognises the rights of all stake holders and seriously considers the effects of corporate action upon them. For example, hostile takeovers may typically involve damage to the interests of stake holders who are other than stockholders, and often violate implicit contracts with them. Stake holders impact on any organization, be it government or private and they in return are impacted upon by an organization. Extensive fieldwork has revealed that the Ethiopian Tourism Commission, for example, has a number of stake holders that impact on its tourism development process. Figure 8-2 shows, that these stake holders include: (a) the government; (b) employees of the Commission; (c) government departments; (d) the community; (e) the competitors; (f) wholesale tour operators, and (g) the tourists, etc.

Figure 8-2
Stake holders of the Ethiopian Tourism Commission



The government of the day may enhance or retard tourism development. Allocation of the necessary budget, the issue of a tourism policy, the deregulation of tourism facilities development, and the like are the responsibility of the government. If the government does not appreciate the significance of tourism, it will retard any development process. Employees must have a commitment for tourism development, otherwise their inefficiency or lack of enthusiasm will too have an adverse effect. Tourism requires the involvement of various government departments, for example, the agriculture and Forestry Department, Internal Affairs, Finance, Foreign Affairs, Industry, Labour, and Transport Department will all have their roles to play in tourism development. Community appreciation of and participation in tourism development is important. Communities must be convinced that any tourism development program in their areas will bring benefits to them. Competition is another major area tourism authorities need to watch. It takes away potential or even existing markets. It can affect the country's tourist inflow, but may also be a catalyst for the country's tourism development in a concerted manner. Because of competition, the government may be willing to allocate significance

funds and may issue favourable tourism policies. Wholesale tour operators and travel agencies are very important. They are the middlemen between tourists and the destination. They who perform other functions that impact in the purchase decision process, eg. facilitations, influences etc. They can promote a destination or can drop it from their promotional materials. Their acceptance of a destination as a viable tourism destination is good news. Therefore, their role as stake holders cannot be underestimated.

In the final analysis, the decision to visit a tourist destination remains with the tourists. No matter how hard the government has promoted tourism or how hard tourism operators have tried to sell a destination, unless the tourists make up their minds to visit the destination, all efforts will have been in vain. Tourists must be convinced that a particular destination will give them their money's worth, has a good image, is politically stable, is easily accessible and has top-quality tourist products and facilities. The impact each of these stake holders makes on the Commission is charted in work sheets in following pages. These work sheets have been developed from extensive discussion and interviews with government and private officials, international airlines, international organizations and officials of the Ethiopian Tourism Commission during the field work.

8.4.1 Stake holder Assumptions

In order to undertake stake holder analysis, a stake holder map was developed to define the various stake holders and their inter-relationships. Figure 8-2, in the preceding page, shows the various stake holders of Ethiopian tourism. These include the government and its various department, tourists, Governments of neighbouring countries, wholesale tour operators and travel agencies, the media, airlines, etc. As mentioned earlier the assumptions are based on intensive discussions and interviews with several officials of the government, private sector, international airlines, and international organisations in the country. As shown in Table 8-7, two basic

assumptions are derived - supportive and resisting. Supportive assumptions of stake holders suggest that the stake holders will positively impact the country's tourism development. Resisting assumptions, on the other hand, show negative perception of tourism development and hence do not support it. Each assumption is also rated on a scale 0 to 9 for its 'importance' and 'certainty'. Importance indicates the degree of each major assumption in either supportive or resistive form. For example, the government's introduction of a tourism policy is a major supportive assumption which is very important (9 on the importance column). On the other hand that, such a policy might not be issued is not certain, hence 4 on the certainty column. All major assumptions of stake holders have been developed in the same manner.

Table 8-7
Stake holders Assumptions

Stake holders	Major Assumptions	Assumption Rating	
		Importance	Certainty
1. Government	<u>Supporting</u>		
	a. Tourism policy	9	4
	b. Investment	9	4
	c. Restructuring	5	0
	d. Image enhancement	9	0
	e. Stability	9	2
	<u>Resisting</u>		
a. Relegate tourism	5	4	
2. Employees	<u>Supporting</u>		
	a. Commitment	9	3
	<u>Resisting</u>		
a. Uncommitted	7	4	
3. Govt Depts	<u>Supporting</u>		
	a. Cooperation	9	4
	<u>Resisting</u>		
a. Uncooperative	4	2	
4. Community	<u>Supporting</u>		
	a. Welcome tourism dev't	7	4
	b. Preserve attractions	9	1
	<u>Resisting</u>		
a. Reject tourism	6	4	
5. Competitors (Neighbouring countries)	<u>Supporting</u>		
	a. Joint promotion	5	1
	<u>Resisting</u>		
a. Hostile attitude	4	8	

Table 8-7
Stake holders Assumptions (continued)

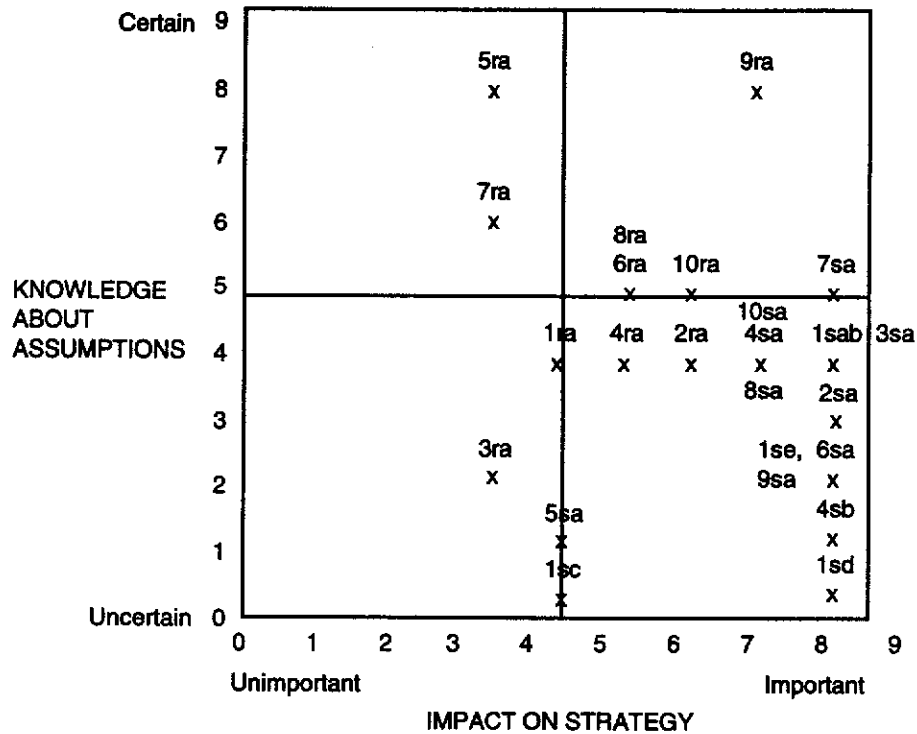
Stake holders	Major Assumptions	Assumption Rating	
		Importance	Certainty
6. Tour Operators and Travel Agencies	<u>Supporting</u> a. Market Ethiopia	9	2
	<u>Resisting</u> a. Exclude Ethiopia	6	5
7. Tourists	<u>Supporting</u> a. Visit Ethiopia	9	5
	<u>Resisting</u> a. Avoid Ethiopia	4	6
8. Hotel Chains	<u>Supporting</u> a. Build hotels	8	4
	<u>Resisting</u> a. No hotel building	6	5
9. Media	<u>Supporting</u> a. Favourable reporting	9	2
	<u>Resisting</u> a. Unfavourable reporting	9	8
10. World Tourism Organization	<u>Supporting</u> a. Training and technical assistance	8	4
	<u>Resisting</u> a. No training or any other assistance	7	5

Keys to ratings

- 9 = very important assumption; one that has the most significant impact on the strategy and its outcome;
 very certain assumption; one that is most likely to be true because either it is self-evident or there is substantial evidence to support its validity.
- 0 = unimportant assumption; one that has very little impact on the strategy;
 very uncertain assumption; one that has little or no supporting evidence, is questionable, and is likely to be invalid.

The values of the foregoing assumptions (Table 8-7) are presented in Figure 8-3. The impact-knowledge matrix is designed to graphically show the positions of each major assumption.

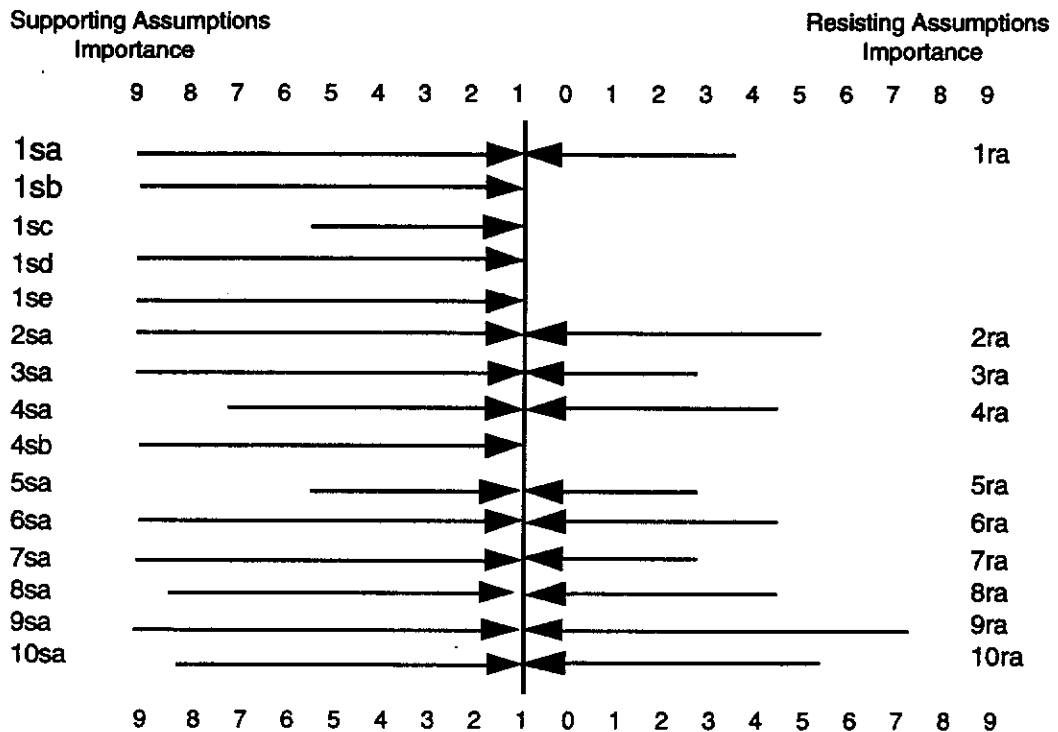
Figure 8-3
Stake holder Assumption Impact On Strategy



Note: 1-10 = Stake holders 1-10; s_a = Supporting assumptions; r_a = Resisting assumptions
 x = position of each assumption

As can be seen from Figure 8-3, most of the assumptions are fairly important but their certainty is not very clear. For example, “1sd” ie government (1) supporting assumptions (5) of image enhancement (d) is on the 9.0 scale of the matrix. This means that the country’s image must be improved (9) but the likelihood of this happening is uncertain (0). On the other hand, “5ra” ie competitors (5) resisting assumption (r) of hostile attitude is on the 4/8 scale of the matrix. This means that the competitors’ hostile attitude is slightly important (4) but the likelihood of its occurrence is certain (8). All other assumptions can be read from the matrix in the same manner. An assumption force-field analysis can be used to assess the stakeholders’ overall impact on the strategy. Such an analysis is shown in Figure 8-4. This is an extrapolation of Figure 8-3 to give a clearer picture of the supporting and resisting assumptions and their importance.

**Figure 8-4
Assumption Force-Field Analysis**



It is assumed that if the supporting assumptions outweigh the resisting ones, the strategy has a chance of being successful. On the other hand, if the resisting assumptions dominate, the strategy is on shaky ground. Nevertheless, a successful strategy will be one that effectively takes advantage of the supporting assumptions and minimises the impact of the resisting assumptions. In the foregoing assumption, force-field analysis, the supporting assumptions outweigh the resisting assumptions. Hence, the Ethiopian Tourism Commission is required to capitalise on these assumptions to develop its tourism strategies.

8.5 Vulnerability Analysis

Vulnerability analysis is used to show how vulnerable the Ethiopian Tourism would be if all supportive elements are removed or denied it. Vulnerability analysis focuses on supportive elements (under-pinning) the removal of which would seriously damage or even destroy the business. The under-pinning can be looked at from two

angles - market and environment. Each of these has been measured on the impact each will have on tourism development and the probability of such incidence to occur. Various threats are assumed if the under-pinning are not available or they are in very insignificant manner. The consequences of such threats are shown. How the tourism authorities react to the impact are also shown. All assumptions are based on discussions and interviews during the field work in Ethiopia with officials of the Ethiopian Tourism Commission and its various departments, government departments, international organizations as well a private sector. Tables 8-8 (a) and (b) and Figure 8-5 show the vulnerability analysis. They are presented as marketing and environmental under-pinning. The impact absence of each underpinning will have is shown between 0 to 10. The probability of such occurrence is shown between 0 to 1 and the reaction is obtained by multiplying impact by probability and is used as a basis for positioning each underpinning in Figure 8-5.

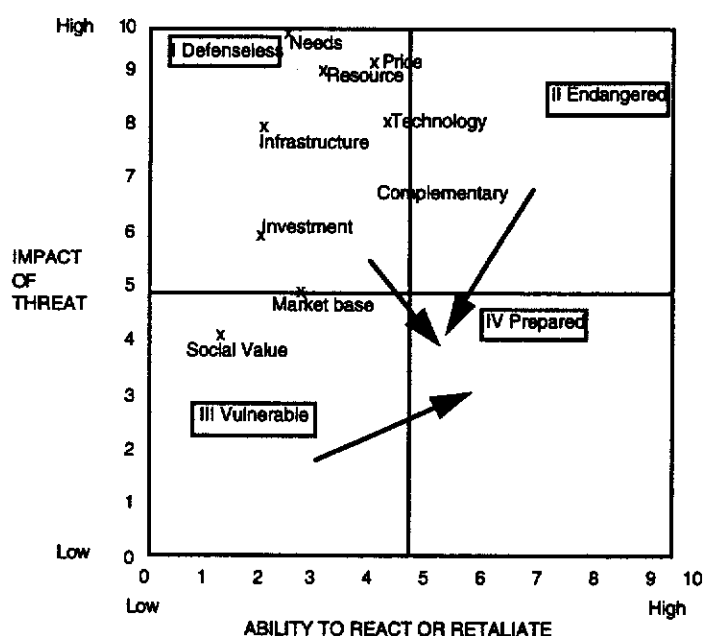
Table 8-8(a)
Vulnerability Analysis - Marketing Under-pinning

Under-pinning	Threat	Consequence	Impact 0-10	Prob. 0-1	React'n 0-10	Vuln Assess
1. Needs and wants of tourists served by attractions	Decline in tourist numbers	Loss of foreign exchange	10	0.3	3.0	I
2. Resources	Loss of skilled manpower	Poor service	9	0.4	3.6	I
3. Price of destination	Costly	No tourists	9	0.5	4.5	I
4. Market base	Low	Loss of revenue	5	0.6	3.0	III
5. Investment	Low	No tourism development	6	0.4	2.4	I
6. Goodwill	Market loss	Revenue loss	10	0.6	6.0	II
7. Complementary services	Inadequacy	Loss to competitors	7	0.6	4.0	I

Table 8-8(b)
Vulnerability Analysis - Environmental Under-pinning

Under-pinning	Threat	Consequence	Impact 0-10	Prob 0-1	React'n 0-10	Vuln Assess
Technology	Low	Loss to competitor	8	0.6	4.8	I
Social Value	Concern over culture	Fewer tourists	4	0.4	1.6	II
Infrastructure	Low	Low development	8	0.3	2.4	I

Figure 8-5
Vulnerability Assessment Graph



As Figure 8-5 shows, the vulnerability assessment matrix indicates that the Ethiopian tourism development is defenceless, endangered, or vulnerable. This suggests that the Tourism Commission must abandon strategies that particularly contribute to this problem, take immediate steps to improve their capability or develop explicit contingency plans, particularly for those threats that are very likely to materialise. All efforts have to be made to move from matrix I, II and III to IV. Of course, this is

a huge task that requires commitment, resources, proper placing, and long-term alternative strategies.

8.6 Growth Vector Analysis

The growth vector analysis is used to determine the position of each of Ethiopia's tourist attractions and to identify all product/market options available. Ethiopia has a large number of attractions that can be marketed in the future. However, at present only a few areas have been developed, the historic routes and weekend resorts. Table 8-9 shows alternative strategies that can be seen in light of the country's attractions.

Table 8-9
Growth Vector Analysis for the Ethiopian Tourism Development

MARKET OPTIONS	Existing Market	Market penetration - Historical - Cultural - Conference - Ethnic - Game	Product variants; imitations - Historical - Cultural - Conference - Ethnic - Game	Product development - Health - Event - Religion
	Expanded Market	Aggressive promotion - Historical - Cultural	Market segmentation, product diversification	Vertical diversification
	New Market	Market expansion - Historical - Cultural - Ethnic	Market extension	Market development
		Existing Products	Improved Products	New Products
		PRODUCT ALTERNATIVES		

Because of heavy competition for safari tourism, the country at present does not have a significant position in the tourist industry. However, its rich historical routes, as well as abundant resort areas are waiting to be promoted. Moreover, since many

international organizations such as the United Nations Economic Commission for Africa (ECA), the Organization of African Unity (OAU), are based in Addis Ababa, focus could also be made to strengthen the country's potential as a conference center. Addis Ababa is at the cross-roads between Europe and the Middle East to the rest of Africa. This geographic advantage should be exploited. Because of the country's beautiful scenery and abundant wildlife, eco-tourism is a great possibility and other areas of focus could be health tourism because of the numerous hot springs of a curative nature and special events such as annual athletics competitions, to capitalise on the name of our world-renowned athlete, Abebe Bikila.

8.7 Product Portfolio

The primary purpose of the product portfolio analysis is to allocate resources among products and to maximise long-run profits. It is intended that a product mix be balanced so that future growth is ensured by building on new products, maintaining others and dropping yet others. This can easily fit into the Ethiopian tourism sector. For example, the country has been promoting the historical routes since the inception of the Tourism Development Department nearly three decades ago. Other newcomers in the list of attractions include game-parks, resort areas and religious as well as conference tourism. While some have flourished and contributed to substantial foreign exchange earnings, others have become ineffective. Therefore, a product portfolio analysis could assist the government in identifying the most promising attractions. As shown in Figure 8-6, attempts must be made to move these prospective products to a higher stage.

**Figure 8-6
Product Portfolio Matrix**

PRODUCT ATTRACTIVEIONS	High		Conferences Historic routes	Game parks Wildlife
	Medium		Resort areas	Cultural activites
	Low			Archaeological sites
		High	Medium	Low
		PRODUCT POSITION		

The above products, despite their small size and haphazard marketing, have the potential to develop, provided sufficient government focus is made and private participation is called for.

8.8 Strategic Position and Action Evaluation (SPACE)

Strategic position and action evaluation (SPACE) is used to determine the appropriate strategic posture for Ethiopia's tourism and each of its individual departments. SPACE assesses the tourism's position by using industry assessment and company assessment. Industry assessment pinpoints the factors that determine environmental stability (ES) and factors that determine industry strength (IS). On the other hand, company assessment looks into factors determining competitive advantage (CA) and those that determine financial strength (FS). SPACE has been developed on the basis of information obtained during field work in Ethiopia. Discussions and interviews were conducted with officials of the Ethiopian Tourism

Commission as well as Government departments and international organizations. Each of the factors are evaluated on a bi-polar scale from 0 to 6 In Tables 8-10 to 8-13.

Table 8-10
Factors Determining Environmental Stability (ES)

Technological changes	Many	0	1	2	3	4	⑤	6	Few
Rate of inflation	High	①	1	2	3	4	5	6	Low
Demand variability	Large	0	①	2	3	4	5	6	Small
Price range of competing products	Wide	0	①	2	3	4	5	6	Narrow
Barriers to entry into market	Few	0	1	2	3	④	5	6	Many
Competitive pressure	High	0	①	2	3	4	5	6	Low
Price elasticity of demand	Elast	0	①	2	3	4	5	6	Inelas
Average -6 = -4.14									

Table 8-11
Factors Determining Industry Strength (IS)

Growth potential	Low	0	1	2	3	④	5	6	High
Profit potential	Low	0	1	2	③	4	5	6	High
Financial stability	Low	0	1	②	3	4	5	6	High
Technological know-how	Simple	0	1	②	3	4	5	6	Complex
Resource utilization	Ineff	0	①	2	3	4	5	6	Efficient
Capital intensity	High	0	①	2	3	4	5	6	Low
Ease of entry into market	Easy	0	1	2	③	4	5	6	Difficult
Flexibility, adaptability	Low	0	1	②	3	4	5	6	High
Average = 2.25									

Table 8-12
Factors Determining Competitive Advantage Market Share (CA)

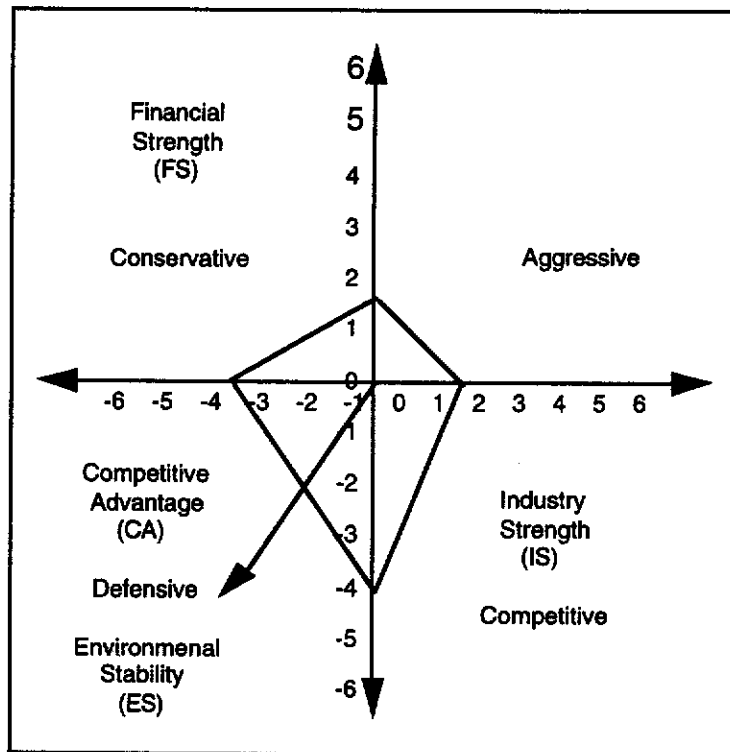
Market share	Small	0	①	2	3	4	5	6	Large
Product quality	Infer	0	1	2	③	4	5	6	Superior
Product life cycle	Late	0	1	2	③	4	5	6	Early
Customer loyalty	Low	0	①	2	3	4	5	6	High
Competitor's capacity utilization	Low	0	1	2	3	④	5	6	High
Technological know-how	Low	0	1	②	3	4	5	6	High
Vertical integration	Low	0	①	2	3	4	5	6	High
Average -6 = -3.86									

Table 8-13
Factors Determining Financial Strength Return on Investment (FS)

Return on investment	Low	0	①	2	3	4	5	6	High	
Leverage	Imbalanced	①	0	1	2	3	4	5	6	Balanced
Liquidity	Imbalanced	0	①	2	3	4	5	6	Balanced	
Capital required/capital available	High	0	①	2	3	4	5	6	Low	
Cash flow	Low	0	①	2	3	4	5	6	High	
Ease of exit from market	Difficult	0	1	2	3	4	⑤	6	Easy	
Risk involved in business	Much	0	1	2	3	④	5	6	Little	
Inventory turnover	Slow	①	0	1	2	3	4	5	6	Fast
Average = 1.62										

It is important to derive the value as shown above because this value would be used in determining tourism's competitive profile as shown in Figure 8.7 below. Environmental stability is plotted along the negative axis as it is a competitive advantage and therefore 6 is taken away from the average. The above ratings were to be plotted on vertical and horizontal axes in Figure 8-7.

Figure 8-7
Industry Competitive Profile



The outcome shows that there is a very low competitive advantage and very low financial strength in a very highly competitive industry. This suggests that it is advisable to defer any significant investment, but to maintain present position and to concentrate on already known product/s - historical and cultural tourism. The environmental scanning must be improved and existing markets must be exploited to the fullest. The four quadrants (shown above) - aggressive, competitive, conservative and defensive postures - indicate the following interpretations: (a) aggressive - attractive industry with little environmental turbulence, new competition. Acquisition, increase in market share; (b) competitive - attractive industry, competitive advantage in unstable environment, financial resources. Improve product line, invest in productivity, reduce cost, protect competitive advantage, merge; (c) conservative - stable market with low growth, financial stability, product competitiveness. Prune product line, reduce cost, improve cash flow, protect competitive products, develop new products, entry into more attractive markets, and (d) defensive - unattractive industry, lack competitive product and financial strength. Retreat, discontinue marginally profitable products, reduce cost, cut capacity, defer/minimise investment.

8.9 Industry Analysis

Industry analysis helps managers to formulate strategies that have a high likelihood of success given the nature of the industry's focus on potential rate of growth, threats of entry, intensity of rivalry, pressure from substitute products, dependence on complementary products and services, bargaining power of tourists, bargaining power of touristy supplies, technological sophistication of the industry, rate of innovation and management capability. Industry analysis for Ethiopian tourism, based on field work, is shown in Figure 8-8.

**Figure 8-8
Industry Analysis**

1. Potential rate of growth of industry (in real terms)

0-3%		
------	--	--

2. Ease of entry of new firms into industry

No barrier	. . . ✓	Virtually impossible to enter (patent protection)
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3. Intensity of competition among firms

Extremely competitive	. . . ✓	Almost no competition
-----------------------	-------------------	-----------------------

4. Degree of product substitution

Many substitutes	. . . ✓	No substitutes available
------------------	-------------------	--------------------------

5. Degree of dependency or complementary or supporting products and services

Highly dependent	. . . ✓	Virtually independent
------------------	-------------------	-----------------------

6. Degree of bargaining power buyers and customers (tourists) possess

Buyers dictate terms	. ✓	Selling firms dictate terms
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7. Degree of bargaining power suppliers and vendors (tourist product suppliers) possess

Suppliers dictate terms ✓ .	Purchasers dictate terms
-------------------------	---------------	--------------------------

8. Degree of technological sophistication in industry

High-level technology ✓ . . .	Very low-level technology
-----------------------	-------------------	---------------------------

9. Rate of innovation in industry

Rapid innovation	. . . ✓	Almost no innovation
------------------	-------------------	----------------------

10. General level of management

Many very capable managers ✓ . . .	Almost no innovation
----------------------------	-------------------	----------------------

The position of Ethiopian tourism in general is weak at present, however its potentiality is great. Appropriate strategies are required to move it from its present stagnation to a more vibrant industry.

8.10 Country Risk Assessment

Country risk assessment gives the degree of riskiness/non-riskiness of a country. It is a useful indicator for foreigners who intend to invest in a given country. It evaluates the country's political, economic, managerial as well as monetary considerations. The analysis tries to quantify the key factors and therefore is not a mathematical model. As Table 8-14 shows, desirability scores range between 1 and 100, the lower the score the less desirable the country is for investment. As mentioned earlier, this assessment is based on information from field-work in the country.

Table 8-14
Country Risk Assessment

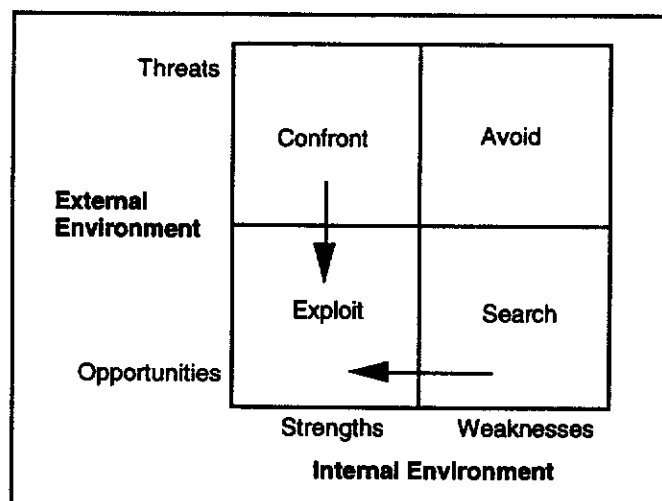
Factor	Desirability Score (1-100)
1. Political stability	10
2. Monetary considerations	10
3. Infrastructure	30
4. Managerial considerations	40
5. Economic and tax considerations	10
Total score =	100
Average score (total score + 5) =	20
Riskiness = $1 - \frac{\text{average}}{100}$ =	0.80

For Ethiopia a great amount of risk is involved, 0.8, and the country falls short in all aspects, political stability, monetary considerations, economic conditions, infrastructure and managerial considerations.

8.11 SWOT Analysis

SWOT analysis is an analysis of organizational strengths, weaknesses, as well as environmental opportunities and threats. Used as a technique of corporate strategic planning, SWOT analysis can result in a better understanding of the organization in relation to its environment [Grey et al, 1991: 6]. Rowe et al (1989:235) emphasised that WOTS-UP [sic] analysis helps strategic managers to determine whether the organization is able to deal effectively with its environment. It helps find the best match between environmental trends (opportunities and threats) and internal capabilities (strengths and weaknesses). Rowe et al (1989:235) defined components of SWOT in the following manner: (a) opportunity - any favorable situation in the organisation's environment; (b) threat - any unfavourable situation in the organization's environment that is potentially damaging to its strategy; (c) strength - a resource or capacity the organisation can use effectively to achieve its objectives, and (d) weakness - a limitation, fault, or defect in the organization that will keep it from achieving its objectives. An effective strategy is one that takes advantage of the organization's opportunities by employing its strengths and wards off threats by avoiding them or by correcting or compensating for weaknesses as shown in Figure 8-9.

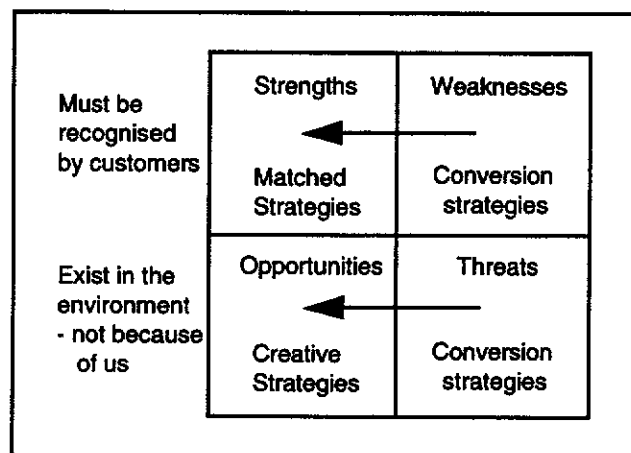
Figure 8-9
WOTS-UP Matrix



Source: Adapted from Rowe et al (1989:236)

Although SWOT analysis has been widely used in business, Piercy and Wiles (1989:5) proposed that its results would be dynamic if applied in the following manner: (a) focused SWOT; (b) shared vision; (c) customer orientation; (d) environmental analysis, and (e) structured strategy generation. Piercy and Wiles (1989:5-7) elaborate on each of the above points, as in Figure 8-10.

Figure 8-10
Customer-Oriented SWOT Model



Source: Piercy and Giles (1989:6)

1. **Focused SWOT:**

The more careful one defines the area to be evaluated with a SWOT analysis, the more productive the analysis is likely to be. Examples could include, a specific product-market, a specific customer segment in a market, the study of named competitors or groups of similar competitors, and product policy in a given market, etc.

2. **Shared Visions:**

SWOT analysis has been an excellent vehicle in working with planning teams or groups of experts. Its advantages are: the pooling of ideas and information from a number of sources, provision of mechanism for expressing team

consensus, and the effect of pushing the team towards agreement and the flushing out of potentially harmful disagreement.

3. Customer Orientation:

In evaluating our strengths and weaknesses, we can only include those resources or capabilities which would be recognised and valued by the customer with whom we are concerned.

4. Environmental Analysis:

The goal is to list things in the relevant environment which make it attractive or unattractive and the search for ideas should be as thorough and widely informed as possible.

5. Structured Strategy Generation:

When all the cells of the SWOT matrix have been completed and ranked in each category, then the matrix automatically serves as a generator of strategies.

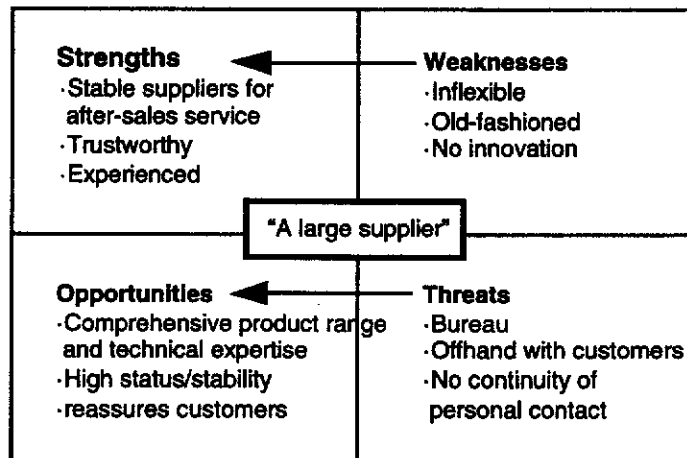
a. Matched Strategies:

the focus here is to match strengths to opportunities in the outside world. Strengths which do not match any known opportunities are of little immediate value, while highly ranked. Opportunities for which we have no strengths are food for further thought.

b. Conversion Strategies:

Since it is difficult to design appropriate responses to highly ranked weaknesses and threats, the goal is ideally to convert these factors into strengths and opportunities. Figure 8-11 explains this.

Figure 8-11
"An Old Established Firm"



Source: Adapted from Piercy and Giles (1989:7)

c. **Creative Strategies:**

To going through the analytical process is to generate new, creative ideas for developing the business.

Grey et al (1991:6) emphasised that SWOT analysis can also assist in the creation of strategies which take maximum advantage of strengths and opportunities while minimising weaknesses and threats. Weichard (1992:177-178) identified the characteristics of components of SWOT analysis in the following manner: (a) strengths - those positive characteristics that in the eyes of the client distinguish your tourist products from others. For example, convenience of location, product range, standard of service can be cited as strengths;. (b) weaknesses - those negative characteristics that can put your organization at a disadvantage to the competition. For example, competing with destinations that are better positioned geographically, or with better trained and qualified man power; (c) opportunities - these may include new commercial development or a change in demographics of the population, and (d) threats - an increasing aggression from a competitor, potential political instability, etc.

Pearlman (1989:12-13) indicated that SWOT analysis relates to all those key parameters which form the basis of appraising tourism potential. As Grey et al (23) pointed out, it is to some extent arbitrary to classify items under one particular heading rather than another. With respect to any item, there may be advantages, disadvantages, lost opportunities or opportunities still existing to improve. The proximity of major international ports of entry (air and sea), as well as proximity to key feeder areas which already act as tourist magnets, can be interpreted as an opportunity or a threat within the SWOT analysis - the opportunity to draw on a large immediately accessible market if the product is right, and the threat posed by brand loyalty to an existing location. [Pearlman, 1989:10].

According to Weichard (1992:177-178) SWOT analysis as a stock-take of the destination's strengths, weaknesses, opportunities and threats attempts to analyse the following areas: (a) strengths - the positive characteristics that in the eyes of the client distinguish the destination from others, eg. location, standard of services, product range; (b) weaknesses - negative characteristics that can put a destination at a disadvantage to the competition, eg better location of competing destinations; (c) opportunities - new commercial developments in the area or change in the demographic characteristics of the population, and (d) threats - increasing aggression from competitors, a rise in operating costs, potential political stability. As Grey et al (1991:6) reiterated, used as corporate strategic planning, a SWOT analysis can result in a better understanding of the organization in relation to its environment. It can also assist in the creation of strategies which take maximum advantage of strengths and opportunities while minimising weaknesses and threats. In East African countries, for example, the emphasis on wildlife resources dates back to 1967-1977 when three countries - Kenya, Tanzania and Uganda - joined hands to develop a regional tourist-circuit based primarily on wildlife safaris. [Delupes, 1987:10]. Dieke (1991:274) indicated that Kenya's wildlife resources, distributed over forty locations, occupy 7% of Kenya's surface land area and give the country a

comparative advantage in providing both wildlife and beach tourism as both areas able to provide these facilities are very close to each other. A single destination cannot possibly serve the total market.

According to Goodall and Ashworth (1990:269), identification of target markets or market segments can be assisted by a SWOT analysis in which the strengths, weaknesses, opportunities and threats are examined. Goodall and Ashworth (1990:269) explained that the strengths of a tourist destination may include those attractions and facilities of the destination which match up to consumers' requirements, etc. eg.. (a) for a summer sun holiday - sunshine, warmth, beaches with clean sand and good bathing conditions; (b) for a skiing holiday - pistes, an integrated lift system, and (c) for a cultural holiday - historic art facts, museums, events. Weaknesses may be identified, for instance, in facilities - accommodation, both self-catering and budget-priced hotels. Opportunities can be either internal (controllable) or external (uncontrollable). Examples of internal opportunities include the development of special types of activities while external opportunities could include transport improvements. Similarly, internal threats could include a deterioration in the quality of the destination's attractions while external threats may be increasing competition from other destinations, exchange rate fluctuations, and acts of international terrorism. Coltman's (1989:169-170) supplier situation analysis in identifying new market opportunities also outlined both internal and external opportunities. These are: (a) internal opportunities - improving an existing product, introducing a new product, revitalising a product near the end of its life cycle, increasing a strength, decreasing a weakness, raising and improving customer satisfaction, and (b) external opportunities -market share, market development, and product development.

Holloway and Plant (1988:27) stated: "SWOT analysis is the identification of strengths and weaknesses in the business, the opportunities presented by the trading

environment and any threats faced by the company”. A SWOT analysis of the tourism industry is a necessary first step in a systematic appraisal of the present position of the industry and to identify its problems, prior to determining objectives for the future. The tourism industry must be aware of: (a) the economic, political, legal, socio-cultural and technological events which currently affect or could have a bearing on industry operations and performance; (b) the current shape of the markets served by the industry, including their size, growth, and trends; (c) the nature of the competition, including size of each competitor, share of the market they hold, their reputation, marketing methods, strengths and weaknesses, and (d) full details of the industry’s own market share, sales, profitability, patterns of trade. As Holloway and Plant (1988:26-29) further explained, strengths may include established reputation in the region, reliability of services, location and attractions. On the other hand, weaknesses may include locations as well as incompetent staff. Opportunities may be new markets while threats may be too many competitors.

8.12 Key Success Factors

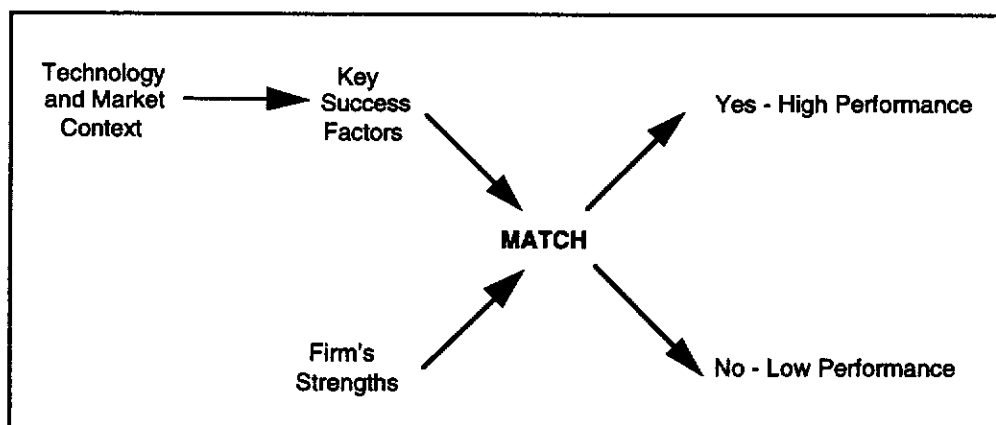
Rockart (1979) indicated that the concept of “success factors” was first discussed in the management literature in 1961 by D. Ronald Daniel as a useful concept for information systems thinking. Rockart stated that critical success factors are, for any business, the limited number of areas in which results, if they are satisfactory, will ensure successful competitive performance for the organization. Jenster (1987:105) defined success factors as “those limited numbers of factors important to strategic success”. They must be monitored to ensure successful execution of the firm’s strategic programs. They can be used to guide and motivate key employees to perform in a desired manner. Critical Success Factors (CSF, forerunner for key success factor) are the limited number of areas in which results, if they are satisfactory, will ensure successful expert competitive performance for the organization. They should receive constant and careful attention from management [Rockart, 1979:P85]. CSFs come from four distinct sources identified by Rockart

(1979:86-87). These are: (a) structure of the particular industry - each industry by its very nature has a set of critical success factors that are determined by the characteristics of the industry itself; (b) competitive strategy, industry position, and geographic location - the competitive strategy may mean establishing a new market niche, getting out of a product line completely, or merely redistributing resources among various product lines; (c) environmental factors - as the GNP and the economy fluctuate, as political factors change, and as the population waxes and wanes, critical success factors can also change for various institutions, and (d) temporal factors - internal organizational considerations often lead to temporal critical success factors. These are areas of activity that are significant for the success of an organization for a particular period of time. The steps that are followed by Rockart's methods are as follows: (a) executives of an organization develop answers to the question "what does it take to be successful in this business"; (b) the planning process reviews and refines the answers to stated goals and objectives, and (c) identification of a means of performance measurement of each of the stated critical factors.

Although key success factors are important in successful businesses, they are different from industry to industry. [Vasconcellos, 1988]. For instance, in the automobile industry, a strong dealer network is a key success factor because the dealer's ability to sell is critical to the survival of the manufacturer. In the airline business, the high load factor is crucial to the company because irrespective of the number of seats filled, the flight has to depart as scheduled, therefore, the more seats filled the better. Such critical factors can serve three purposes: (a) to clarify managerial focus by highlighting similarities and differences among executives' critical success factors; (b) to develop top management information needs by relating critical success factors to specific items of decision support information, and (c) to set information systems priorities by defining the gap between available and required information as it is related to the importance of the critical success factor. Jenster

(1987:106) suggested that the success factors must: (a) reflect success of the defined strategy; (b) represent the foundation of this strategy; (c) be able to motivate and align the managers as well as other employees, and (d) be very specific. Vasconcellos (1988:56, 61, 62) defined success as “outperforming the competition in terms of profitability”. His research (1988, 1991) into mature products suggested that in order to succeed: (a) one must not get lost in detail; (b) focus efforts; (c) know your strengths, and (d) stay close to home. Vasconcellos and Hambrick (1989) developed a model of the origin and implications of the KSF as shown in Figure 8-12.

Figure 8-12
Origin of Key Success Factors



Source: Vasconcellos and Hambrick (1989:368)

Although Vasconcellos and Hambrick based their study on mature industrial products, the results could be tested with service industries as well - in particular the tourism sector where tourists products are required to appeal to potential customers (tourists). Vasconcellos reiterated that critical success factors relate to the basic internal or external conditions for the firm's strategy (eg customer acceptance, competitive move) or those competencies or resources (eg human, financial) it must attain. Key success factors in any business will depend on the economies of the industry. Vasconcellos (1988) further pointed out that the existence of KSFs does not by itself imply that they differ from one type of business to another. One could

have a situation where the same set of attributes would be essential for performance across a wide range of businesses. In such a case, one would have a common set of KSF. However, both strategy theory and the available anecdotal evidence suggest that what is critical for performance is different in different types of businesses. KSFs are not the same for all businesses. Neither are they constant. Within any industry, all companies will share some KSFs but each will also have different KSFs derived from its competitive strategy, position within the industry, geographical location, environmental factors and temporal factors [Rockart, 1979]. The three major categories of KSFs to be considered are: (a) market related - pricing, distribution network, image; (b) product related - product range, timing, innovation, and (c) functional - human resources, technology, finance. Any specific factor can be regarded as key success factor if business success largely depends on whether a company has particular capabilities for exploiting that factor. In other words, identification of key success factors can help to determine how a company's capabilities should be developed for competitive advantage.

8.12.1 Key Success Factors and the Service Industry

A number of different ways have been suggested to differentiate services from products because of their intangibility, perishability, heterogeneity, and demand fluctuation [Cowell, 1981]. Greenley and Matcham (1990:39) indicated:

The characteristics of intangibility, perishability, heterogeneity and demand fluctuation are, within the context of marketing decision making, variables which are likely to lead to a higher degree of risk than similar decisions that have to be made for manufactured products.

One of the common characteristics of service industries is the key role played by the employees who personally interact with customers. Since services are supplied by people not machines, standard and quality are likely to vary [Greenley and Matcham, 1990:35]. As the image of a business can be affected by the way employees handle

their customers, it is essential that the business should, according to Hobson (1984:9): (a) select employees for service positions who already possess the desired interpersonal skills; (b) train all service employees in the specifics of projecting a positive image, and (c) evaluate performance of service-delivery personnel and reward or punish accordingly [Hobson, 1984:9]. It is also indicated that Total Quality Management (TQM) is the key to success. TQM requires strong commitment to key success factors. Melum (1990:42) identified these key success factors as: (a) vision of quality; (b) understanding the process; (c) motivation to change; (d) employee commitment; (e) teamwork; (f) TQM support system, and (g) precedent for success.

8.12.2 Key Success Factors in Tourism Development

Chisman (1989:160) indicated that key result areas can be used to describe the major achievement to be had which will derive from a systematic analysis of corporate objectives down the organization hierarchy. Fox and Ritchie (1991:2) indicated that although providing high quality service is increasingly recognised as a critical factor in the success of firms in the travel and tourism industry, relatively little research has been directed toward improving our understanding of the fundamental nature of QOS (quality of service) or how best to measure its ill-defined nature. Key result areas will be textual descriptions such as meeting production schedules, maintaining employee morale, etc to provide a quantified guide to performance. Murphy (1989:103) reiterated that identifying the key success factors is a prerequisite for identification of the strategic issues, for the KSFs are the benchmarks against which the result is measured. The ability to translate key success factors into marketplace or different product markets is a challenge for the organization whether it would provide a structure that encourages the ongoing evolution of the organization as it pursues success in a changing business environment. The Economic Planning Advisory Council of Australia's study on tourism identified relevant factors which would boost the industry's growth. These included: (a) staff with high standard of

service; (b) a range of quality tourist accommodation, built attractions, and shopping facilities; (c) an efficient and effective transport network, and (d) attractive scenery.

8.12.3 Key Success Factors and the Ethiopian Tourism Development

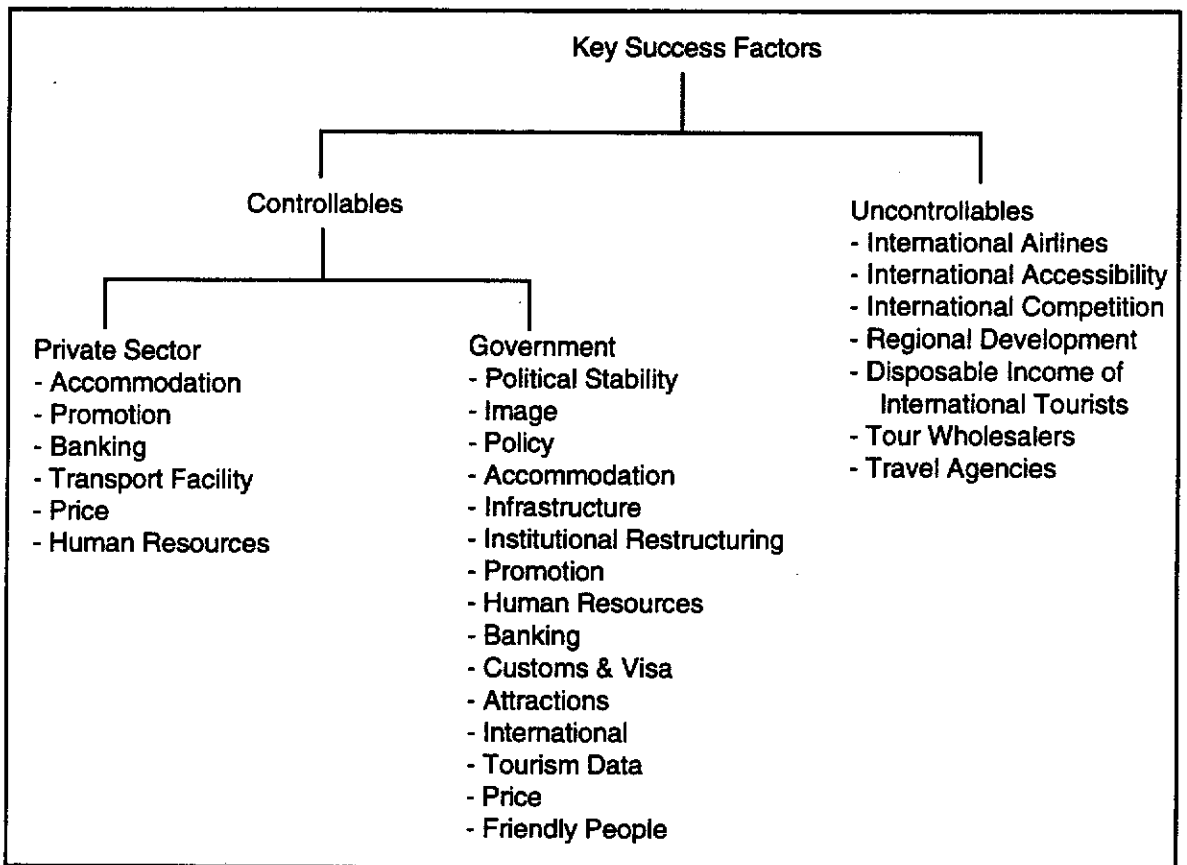
The tourism sector in Ethiopia is the least recognised (in practice) area in the government's development priority. In principle, however, all successive governments from Haile Selassie to Meles Zenawi formulated policies to develop it. During the Haile Selassie reign while the participation of private sector in the development of tourism was promulgated in Negarit Gazeta, both the Mengistu and Meles governments issued economic policies (1990 and 1991) respectively for private participation as in hotel development. Despite the rich historical, cultural and natural attractions the country commands, tourist inflow has been very low compared with the neighbouring countries, especially Kenya. Notwithstanding bountiful tourist attractions, several surveys conducted in Australia as well as in Ethiopia suggest that the country's tourism sector will never rise to a satisfactory level unless there is a change in the image of the country, unless the government policy is changed, unless the country is politically stable, and unless a rigorous marketing strategy is in place. The country's exposure to recurrent drought in the 1980s as well as a protracted civil war in the northern provinces, coupled with the moribund political ideology of the ruling military regime have put the country on the least desired destination list. The seven surveys that form part of this research indicate that improvements in the following areas must be made before the country is able to attract a significant number of tourists. These are shown in Table 8-15.

Table 8-15
Areas of Focus

Areas Needing Improvement	No of Times Mentioned
1. Political stability	Seven
2. The country's image	Six
3. Promotional activities	Six
4. Government policy	Five
5. Infrastructure	Five
6. Institutional restructuring	Four
7. Accommodation	Three
8. Banking facilities	Three
9. Customs and visa formalities	Three
10. Attractions	Two
11. International accessibility	One
12. Human resources	One
13. Tourism data	One
14. Transport facility	One
15. Friendly people	One
16. Price	One

As can be seen from the foregoing, the six areas that stand out clearly include political stability, the country's image, promotional activities, government policy, infrastructure and institutional restructuring. These six areas were mentioned in at least four of the seven surveys (ie 57.1% or more). Without disregarding the remaining ten areas in the list, the aforementioned can be identified as providing the basis for establishing key success factors for the country's tourism development. Of those areas needing improvement, some can be categorised as controllable, while others uncontrollable. Controllable are those areas which can be improved by the Ethiopian Government. Uncontrollable are those areas which are beyond the scope of the government. The government in collaboration with relevant private sectors and international organizations could bring about improvements in the uncontrollable areas as shown in Figure 8-13.

Figure 8-13
Controllable and Uncontrollable Key Success Factors



It appears that, all things being equal, an improvement in political conditions, a change of image, the introduction of effective and efficient promotional strategies, a change in government policy, infra structural improvement and institutional restructuring could contribute to the growth of tourism. Ethiopia needs to evaluate very carefully the major areas that will have an impact on the development of tourism and concentrate on those areas. In order to successfully develop tourism, many factors must be considered. According to Trippier (1987:79) areas that require immediate attention include: (a) the image of the tourism industry; (b) investment in tourism; (c) advice on careers in tourism; (d) the position of tourism within the education and training system; (e) collaboration between employers and educators at the local level; (f) the balance between preservation and development of the environment, (g) flexibility of the tourist industry.

8.13 Ethiopian Tourism: Strengths, Weaknesses, Opportunities, Threats

The identification of key strengths and weaknesses of, opportunities for and threats to Ethiopian tourism is an essential first step in a SWOT analysis. Ethiopia may be among the world's most attractive destinations because of its rich variety of attractions from historical sites to scenic beauty. The country's big tourist resources include the sun and beaches (in the Rift Valley Lakes - eg Langano) culture, scenery, and wildlife [Tourconsult, 1990: 177] as shown in Table 8-16.

Table 8-16
Ethiopia's Attractions and their Locations

	LOCATIONS									
	A	Ba	Bb	Ca	Cb	Da	Db	E	Fa	Fb
Historical										
Buildings	x				x			x	x	x
Centers of culture	x	x			x			x		
Churches	x									x
Monasteries	x	x			x			x	x	
Cave churches	x									
Archaeological sites	x		x							
Museums					x					
Cave paintings			x					x		
Handicrafts								x		
Place of pilgrimage						x		x		
Ethnology	x	x	x	x	x	x	x	x		
Market	x		x					x		
Natural										
Scenic beauty	x		x	x	x	x	x			
Intact nature			x		x	x				
Caves	x	x			x		x			
Volcanoes	x				x	x				
Islands in lakes		x								
Lakes	x								x	
Waterfalls	x				x				x	
Rivers	x		x	x						
Canyon	x									
Thermal waters	x					x				
Mineral sources						x				
Salt deserts					x					
National parks	x	x	x				x		x	
Wildlife reservations	x	x	x		x	x	x			
Bird reservations		x								
Coffee plantations				x						
Gold digging				x						
Trekking				x	x	x				
Rafting			x	x						

Keys

- A = Addis Ababa and weekend areas
- Ba = Rift valley - northern lakes
- Bb = Rift valley - southern lakes
- Ca = South west Ethiopia - southern Omo
- Cb = South west Ethiopia - northern Omo
- Da = Bale - Chilalo mountains
- Db = Borena - Sidamo area
- E = Harerghie area
- Fa = North west Ethiopia - Gonder, Bahir Dar
- Fe = North east Ethiopia - Tigray, Wello

As the above attractions are the country's strengths they must be developed in order to attract a significant number of international tourists and to be competitive in the international tourist markets. The SWOT matrix is shown in Figure 8-14.

**Figure 8-14
SWOT Matrix**

<p>Strengths</p> <ol style="list-style-type: none"> 1. Monuments of historical and religious interest 2. Close proximity to the European and Asian tourist markets 3. Natural attractions 4. Wildlife 5. Scenery 6. Spas 7. Trained manpower 	<p>Weaknesses</p> <ol style="list-style-type: none"> 1. Poor image of the country 2. Constraints on international access 3. No overall development plan for the sector 4. Lack of security 5. Political instability 6. Inadequate government support for tourism 7. Adverse social impacts 8. Regulations affecting tourism industry 9. Tourism shopping 10. Poor promotion and marketing 11. Inadequate transport facilities 12. Inadequate accommodation
<p>Opportunities</p> <ol style="list-style-type: none"> 1. Marketing packages with complementary attractions in the region 2. High profile conference centres 3. International standard hotel construction (Sheraton) 4. New markets 5. National tourism strategy 6. Expanding world tourism 7. Location of international organizations' head offices (eg ECA, OAU, UNDP) 8. Eritrean independence (if both countries can integrate their strategies) 	<p>Threats</p> <ol style="list-style-type: none"> 1. Eritrean independence (if the former province opts to promote and market its tourism products such as the beaches independently) 2. Competitive developments in other neighboring countries 3. Poor standards of service at existing attractions 4. Environmental degradation

As can be seen from Figure 8-14, the key success factors (areas that need improvement) are either weaknesses or threats which should be changed into strengths or developed into opportunities. The focus of the Ethiopian Tourism Commission should be to carefully evaluate the areas in which efforts are needed either to improve or to maintain the existing position. For example, a prior study into each of the components (strengths, weaknesses, opportunities, threats) is imperative. In the case of strengths, Ethiopia's bountiful tourist attractions, as well as the ever increasing trend in the world tourism movement, are to be reckoned with. How Ethiopia will market its enormous attractions to the large number of potential tourists is a challenge that must be taken. Weaknesses need to be overcome through the review of the existing structure, marketing objectives, promotional constraints, as well as through improvements in the visa formalities.

Inadequate government support need to be addressed. Shopping facilities, in particular, duty-free shopping, have to be deregulated, tearing down the monopoly of the Ethiopian Tourist Trading Corporation and the monopoly that exists among tour operators and travel agency must be changed. Opportunities could be seized in the areas of research into new markets or new products, promotion, transport, training, a national tourism strategy, and alliance with neighbouring tourist destinations to create a regional tourist circuit. Threats need to be addressed in order to avoid/minimise them. Concerns to the environment, social impacts, as well as competition from other destinations should be looked into and addressed accordingly. As Grey et al (1991) suggested, three major action implications exist: (a) strategies to exploit opportunities: research, new markets/new products, promotion and marketing, training, foreign investments, national tourism strategies; (b) strategies to overcome weaknesses; capitalise on opportunities, regulations affecting the tourism industry, government support for the sector, shopping, visa regulations, transport policy, government policy, and (c) strategies to overcome or circumvent threats. As such the Ethiopian Tourism Commission will have no

control over them. It is therefore, essential that proper strategic planning that take such threats into account be undertaken.

8.14 Key Result-Objectives for the Ethiopian Tourism Development

In addition to the foregoing, the following work sheet shows key areas for which objectives and measures of performance can be set. Key result objectives provide clues that help answer the question of whether the organisation is able to effectively mobilise its resources amid conflicting goals and policies. These can be treated as critical success factors and development of measures of performance will answer a pertinent question such as “how will the Commission know whether it has been successful on a given factor?” Measures of performance are established to determine whether objectives have been achieved. For example, in marketing, the objectives are to increase tourist in-flow and to increase market share. Whether these objectives are achieved can be measured against tourist statistics, the origins of the tourists and revenue generated. Likewise in the area of innovation, the main objective could be computerisation of tourist data. Performance will then be able to be measured against availability, accuracy and the reliability of such data. Table 8-17 shows the various key result objectives. Each key area must be measured to determine whether performance has been satisfactory.

Table 8-17
Key Result Objectives

Key Area	Objective	Measure of Performance
1. Marketing	Increase tourist inflow Increase market base	Tourist statistics Tourist statistics Origins of tourists
2. Innovation	Computerise tourism data storage	Reliability and efficiency
3. Human Organization	Training	Productivity, quality of service

Table 8-17
Key Result Objectives (continued)

Key Area	Objective	Measure of Performance
4. Financial Resources	Availability of required funds	Efficient operations
5. Physical resources	New hotels New transport facilities	Room capacity Efficiency of travel
6. Productivity	Quality of work	Earnings/employee
7. Social responsibility	Preserve environment Preserve historical, cultural heritage	Balanced ecosystem Visitor numbers
8. Profit	Return on investment	Profit and loss statement

Tables 8-18(a) and 8-18(b) show the objectives and performances of the Ethiopian Tourism Commission for 1984-1991. For example, Table 8-18(a) shows that while the objective was to receive 267,600 tourists by 1991, actual arrivals were 79,495, a staggering 70.3% performance below the planned figure. Table 8-18(b), on the other hand, shows that, of 204,100 holiday tourists planned for 1991 only 15,198 arrived. This is 92.5% below the plan. Key result objectives are essential tools to compare performance against plans and corrections can be made if desired.

Table 8-18(a)
Planned and Actual Tourist Arrivals

Year	Planned	Actual	Gap	% Gap
1984	72,000	58,139	-13,861	-19.2
1985	90,000	63,033	-26,967	-30.0
1986	108,000	61,802	-46,198	-42.8
1987	129,000	60,297	-68,703	-53.2
1988	155,000	79,740	-75,260	-48.5
1989	186,000	73,317	-112,683	-60.6
1990	223,000	80,157	-142,843	-64.0
1991	267,600	79,495	-188,105	-70.3

Source: Data calculated from ETC Ten Year Tourism Perspective Plan
1973 E.C. p.60 and ETC Tourism Statistics (Summary) 1992 p.1

Table 8-18(b)
Planned and Actual Tourist Arrivals by Purpose

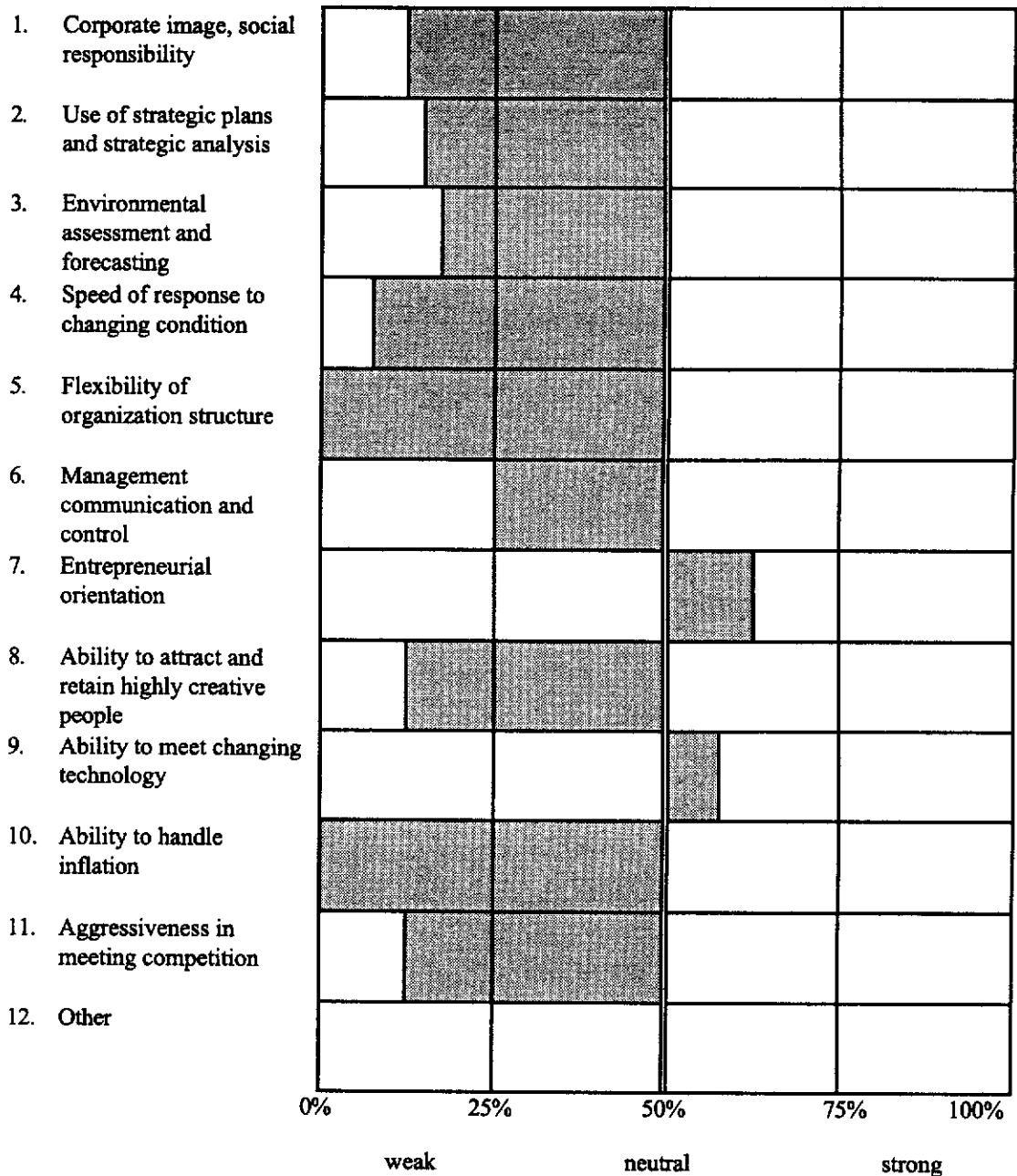
Year	Planned		Actual		Gap	
	Holiday	Other	Holiday	Other	Holiday	Other
1984	28,800	43,200	15,129	43,010	-13,671	-190
1985	45,000	45,000	15,238	47,795	-29,762	-2,795
1986	60,400	47,600	15,586	46,216	-44,814	-1,384
1987	79,000	50,000	12,549	47,748	-66,451	-2,252
1988	102,000	53,000	12,595	67,145	-89,405	14,145
1989	130,900	55,100	12,080	61,237	-118,820	6,137
1990	165,100	59,900	15,460	64,697	-149,640	4,797
1991	204,100	62,900	15,198	64,297	-188,902	1,397
Total	815,300	416,700	113,835	442,145	-701,465	25,445
Annual Average	101,912	52,087	14,229	55,268	-87,683	3,181
% Gap					-86.0	6.1

Source: Data calculated from ETC Ten Year Tourism Perspective Plan 1973 EC p.60 and ETC Tourism Statistics (Summary) 1992, p.2.

8.15 Industry Capability Profile

The following capability profile has been developed following field-work and discussions held with senior officials in the department and in international organizations. The capability profile is a means of assessing and evaluating the tourist industry's managerial, competitive (or marketing), financial, and technical strengths and weaknesses. Once again, the assessment is based on field-work. Figures 8-15 to 8-18 show these factors and their dimension on a scale from 0% to 100%. 0% denotes the weakest performance and 100% denotes the highest performance. In between there is a neutral rating at 50% where a factor is neither strongly indicated or it is weak. The scale 50% → 0% shows weak direction while 50% → 100% shows strong direction.

**Figure 8-15
Managerial Factors**



As can be seen from Figure 8-15, the overall assessment of the Ethiopian tourism industry is it has a weak managerial capability. The direction of the shades in each factor shows this weakness. Only entrepreneurial orientation and ability to meet changing technology show some strength. Competitive factors, on the other hand, show mixed results. As Figure 8-16 shows the strengths of the country's tourism industry are its unique products, customer satisfaction (tourists who visited the

country), and customer (tourist) concentration. On the other hand, weaknesses prevail in the competitive factors, a weak market share, low revenues from tourists, tourist facilities etc.

**Figure 8-16
Competitive Factors**

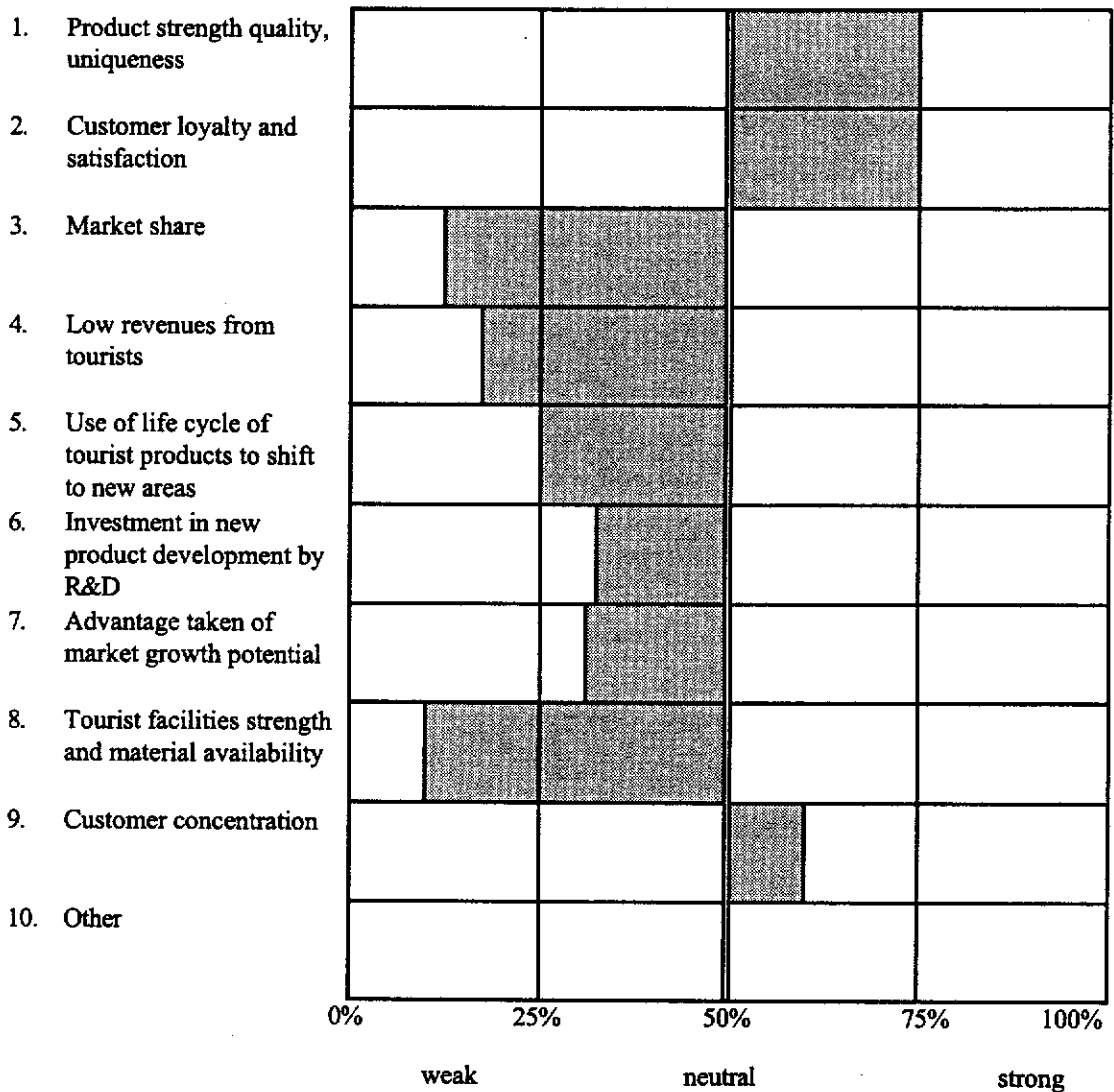
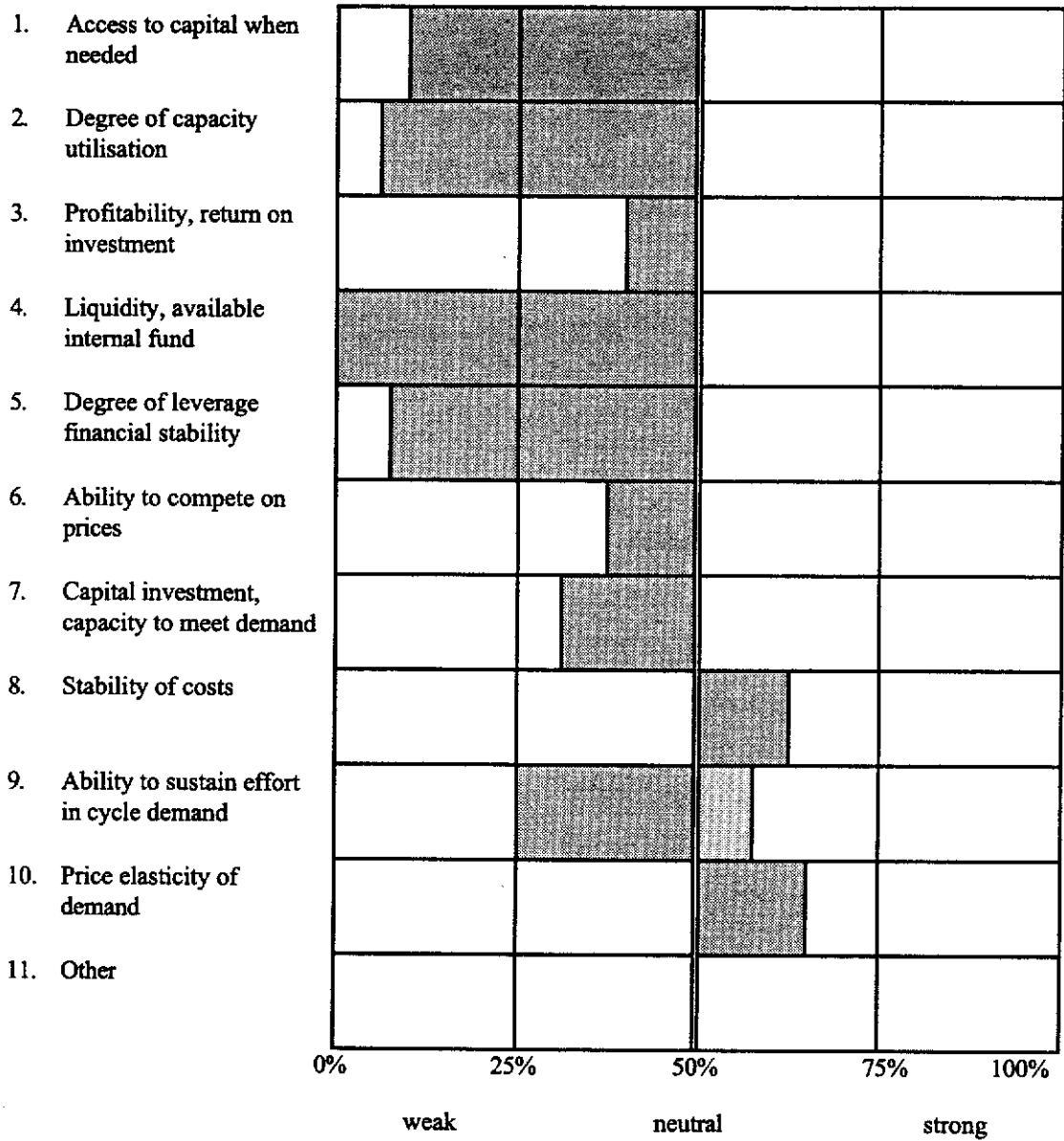


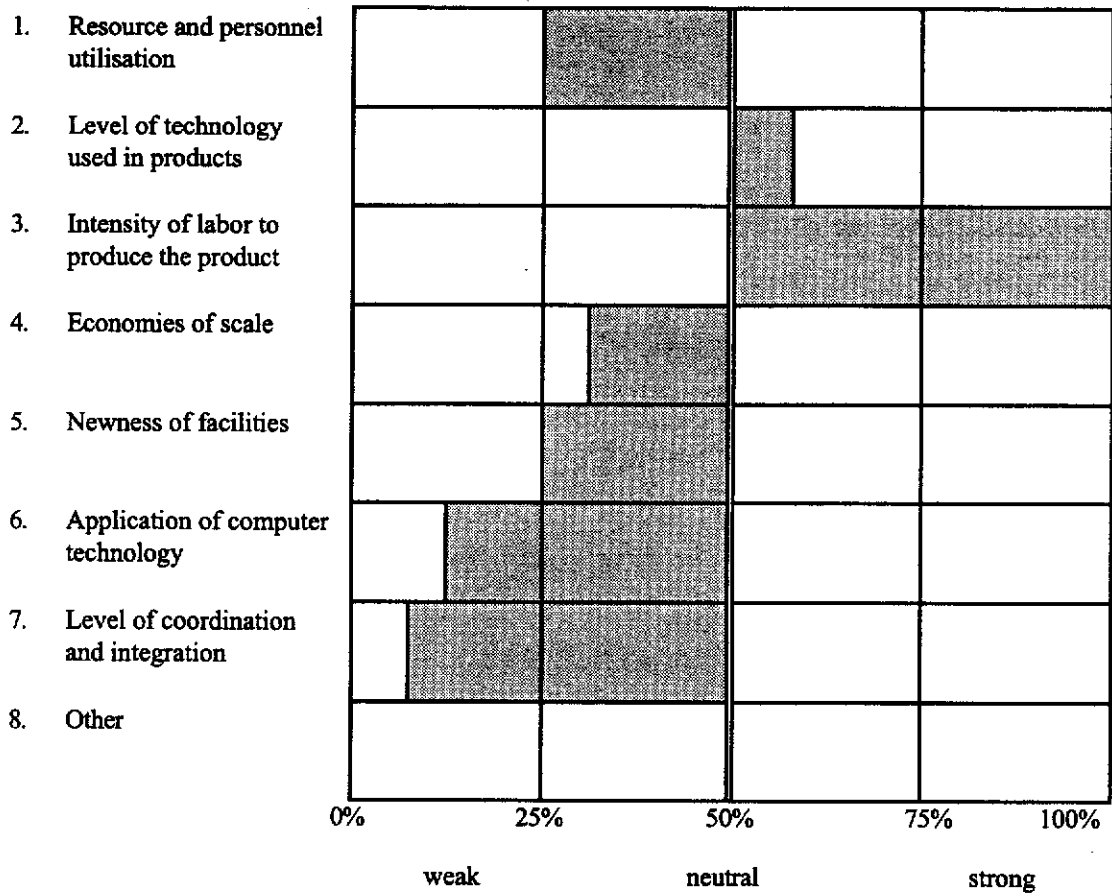
Figure 8-17 focuses on financial factors. The country's tourism sector has a weak financial performance. Funds are not available, investment opportunities, the degree of leverage, and capacity utilisation are all weak.

Figure 8-17
Financial Factors



As Figure 8-18 shows, the strongest factor in the tourism industry is labor intensity. The level of technology usage, including computers, is very weak. Coordination and integration also lack strength.

**Figure 8-18
Technical Factors**



The overall capability profile is very weak. There is a great need for a change in present policies on management, competition, finance and technical development.

8.16 Implications

The foregoing strategy analyses have a significant number of implications for the Ethiopian tourism industry. Tourism development is very weak in Ethiopia. A culture for analysis does not exist. The environmental, vulnerability, capability, and stake holder analysis are areas where there are gaps between plan and performance. As an organisation is vulnerable to all external and internal pressures, an analysis of strategies is essential. The foregoing, based on field-work, has attempted to show where Ethiopian tourism stands. Accordingly, as it is very weak, it needs an appropriate strategy to extract itself from the mess it is in. The identification of an

organisational culture, of mission, of objectives and formulating a strategy or strategies to work towards these objectives, is of paramount importance. Such a strategy was mentioned in the country's Ten-year Perspective Plan. For example, the plan for Ethiopia (1984/85-1993/94) (1984:419-420) with reference to tourism strategies, outlined the following areas of focus: international tourism, domestic tourism, and hotel services.

(a) In international tourism the plan indicated that it would:

- intensify promotional activities at global level through issuing illustrated pamphlets, hold exhibitions, film shows, advertise in newspapers, magazines etc.;
- produce and supply souvenirs in both quality and quantity;
- introduce guidelines on easing entry and departure formalities as well as easing travel procedures within the country;
- expand and or build new hotels and provide other services such as transport, telephones, etc.;
- arrange entertainment programs for tourists entering the country;
- systematise the preservation and the presentation of historic sites, monuments, relics and works of art, and
- encourage the private sector to participate in the catering industry under strict government policy guidelines.

(b) In domestic tourism it would:

- advertise the country's tourist attractions through various media;
- establish "Know Your Country" clubs inside government departments, mass organizations, schools, etc., and
- provide suitable transport and service facilities and control fares.

(c) In hotel services it would:

- specify the roles of government departments and mass organisations in providing accommodation;
- lay down guidelines for the private sector in hotel development, and
- classify hotels according to the established WTO standards.

A promotional strategy drafted by the Ethiopian Tourism Commission in 1991 (1991:32-33) suggested the following: (a) establishing a quasi-governmental association to incorporate the efforts of the government and the private sector in promoting attraction; (b) creating a condition, through which a significant amount of promotional budget be allocated the government and involve the private sector towards contributing its share, and (c) conducting market research to determine which products could be promoted. This strategy is simply rhetoric as long as nothing tangible can be seen that suggests their implementation. Any business entity, be it public or private, needs to identify the critical areas of operation and concentrate on these. Failure in any one of the critical factors will lead to failure in the whole operation. Furthermore, an analysis of strengths, weaknesses, opportunities and threats is essential in order to pinpoint the position of the organization and thereby lay down strategies to overcome weaknesses and threats and capitalise on strengths and opportunities in order to put the organization on the right course. As the foregoing pages indicate, the Ethiopian Tourism Commission has a great task on hand. The current volatile political condition in the country has clouded all opportunities at the end of the tunnel. However, with commitment and sufficient government support, it could be a matter of laying down the ground rules to operate. For this, areas that are essential for success must be identified and followed through. In addition, the SWOT analysis must be able to show a clear picture of the situation. Frechtling (1991:49) wrote:

...although [the World Travel and Tourism Council] research found that travel and tourism produces 5.5% of the gross world product and 7% of all jobs in the world, governments of the world still make decisions key to the future course of tourism under misperceptions that tourism is only a luxury activity not deserving the status of traditional industries such as steel, agriculture, and textiles.

The perception which prevails in Ethiopia need to change. The various analyses carried out in this Chapter was to highlight to the Ethiopian Tourism Commission that serious assessment of the environment of tourism is paramount. The various analyses suggest two things: first, tourism development has a long way to go because of the various unfavourable factors such as political instability, competition, low or non-existent investment opportunities, lack of adequate promotion and marketing both domestically and internationally, lack of coordinated effort to develop tourism, and lack of a strategy to guide the development. Second, Ethiopia has a great potential for tourism development. Man-made, natural and cultural attractions are untapped. Thorough analysis of strengths, weaknesses, opportunities and threats should be taken to determine the development and marketing strategies. All or some of the analyses carried out in this chapter should be replicated to determine the key success factors and stake holders.

8.17 Conclusion

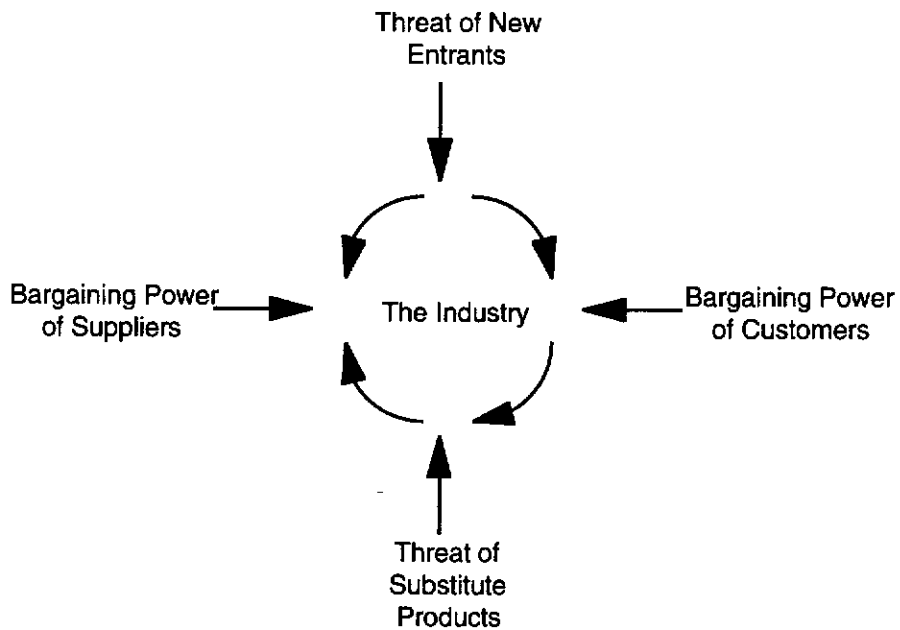
In conclusion, the Ethiopian Tourism Commission has to identify the most critical areas through environmental scanning, SWOT analysis, Key Success Factors analysis, vulnerability analysis, SPACE analysis, as the case may be. Once the areas are properly identified a clear strategy should be developed and adopted. This requires immediate action since delays could mean losing out to competitors whatever slim market share it has. This in turn denies the country badly needed foreign-exchange earnings.

CHAPTER 9
STRATEGIC PROCESSES FOR TOURISM DEVELOPMENT
IN ETHIOPIA - MODELS

9.1 Introduction

By any measure, Ethiopia must be seen as a new entrant into the International Tourist arena. The early efforts to attract tourists were not built upon any well defined strategies. They were based more on intuitions than on any models. Porter's Model (Figure 9 -1) lends some insight into the approaches Ethiopia should take in laying down a strategic framework for its tourism development. The stance taken in this research is to regard Ethiopia as a new entrant into what is a very competitive market. Following Porter's model Ethiopia needs to develop a set of distinct competitive advantages over its competitors for the tourist market.

Figure 9-1
Porter's Model Showing Forces Governing Industrial Competition



Source: Porter, 1980

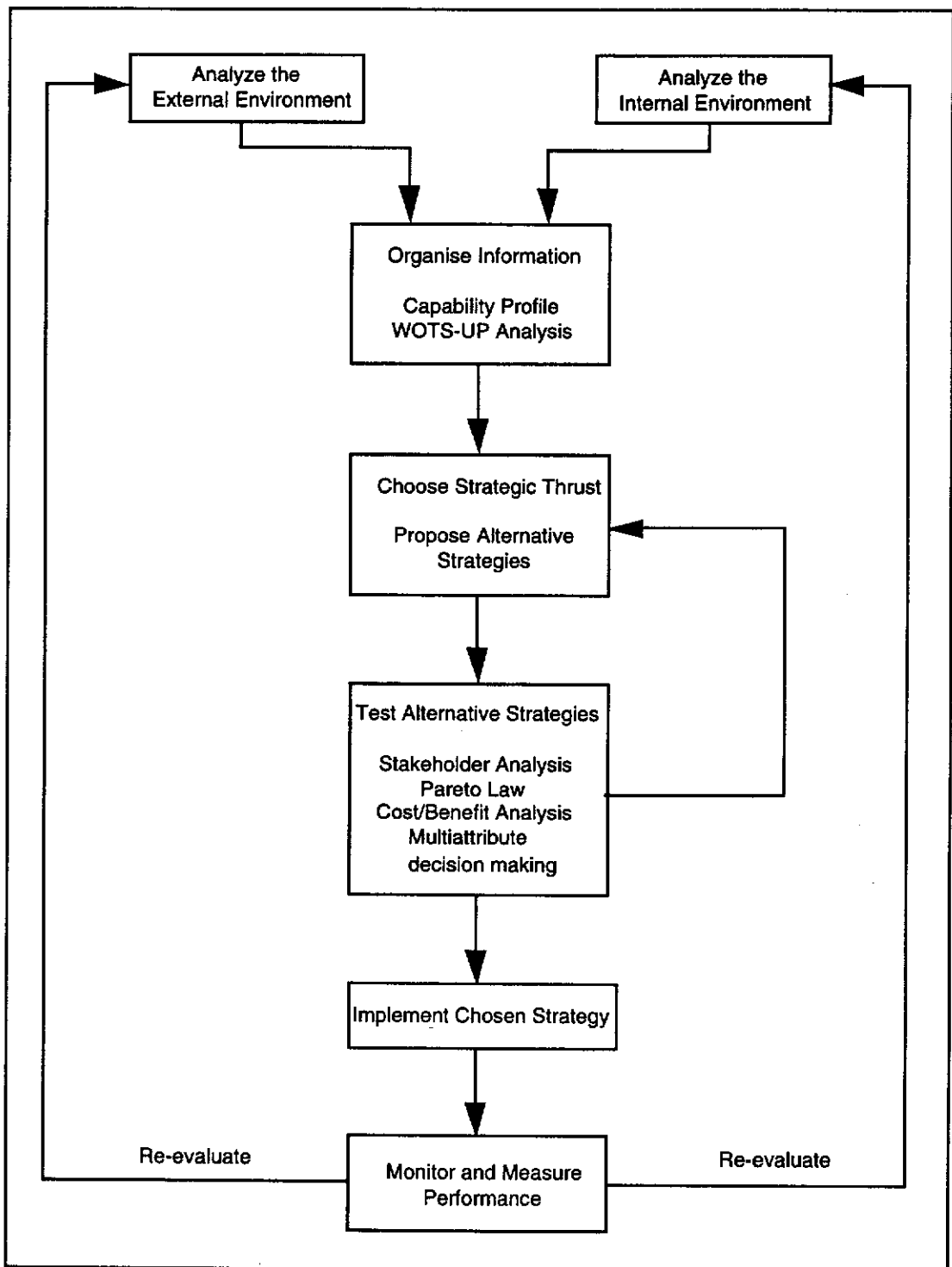
The six important dimensions applicable to the Ethiopian situation from the above model are: the industry, competitors, suppliers, customers, new entrants, and substitute products. The industry referred to here is tourism industry. Competitors are tourist destination which are close neighbours of Ethiopia, including Kenya, Tanzania, Uganda. Suppliers are tourist generating countries while customers are tourists from all regions of the world - Africa, the Americas, Europe, the Middle East, East Asia/Pacific Rim, South Asia, etc. The new entrants are those countries which are promoting their tourist products for the first time. A classic example is Eritrea which until 1993 was part of Ethiopia. Since the 1993 declaration of independence, Eritrea has begun looking into developing tourism. Substitute products are those tourist attractions which would capture the attention of tourists who have been keen on visiting one kind of attraction. For example, tourists may switch from visiting Lalibela churches to watching flamingoes at Lake Shala. While Porter's model may be useful, Ethiopia needs to develop a turn around strategy as what is in Porter's model may not necessarily be applicable in its entirety to the Ethiopian situation. Nevertheless the barriers stressed by Porter (1980) would equally apply to Ethiopia's situation. These are: economics of scale, product differentiation, capital requirements, cost disadvantage, access to distribution channels, and government policy. Porter's competitive strategies such as differentialism, cost leadership, and focus are very useful factors that the Ethiopian tourism authorities should look into.

9.2 Existing Strategic Models and Modifications

The development of a sound strategy in a given destination depends on the destination's potential, the external and internal environment, the role of the government and also on the objectives it wants to achieve. Various mechanisms can be devised for such a strategy. Earlier strategies formulated by various authors reflect the diverse nature of a strategy. For example, as Figure 9-2 indicates a strategy can be evaluated on the basis of external and internal environments.

Through the gathering of necessary information and a WOTS-UP analysis, one would be able to choose a strategic thrust whereby alternative strategies are developed.

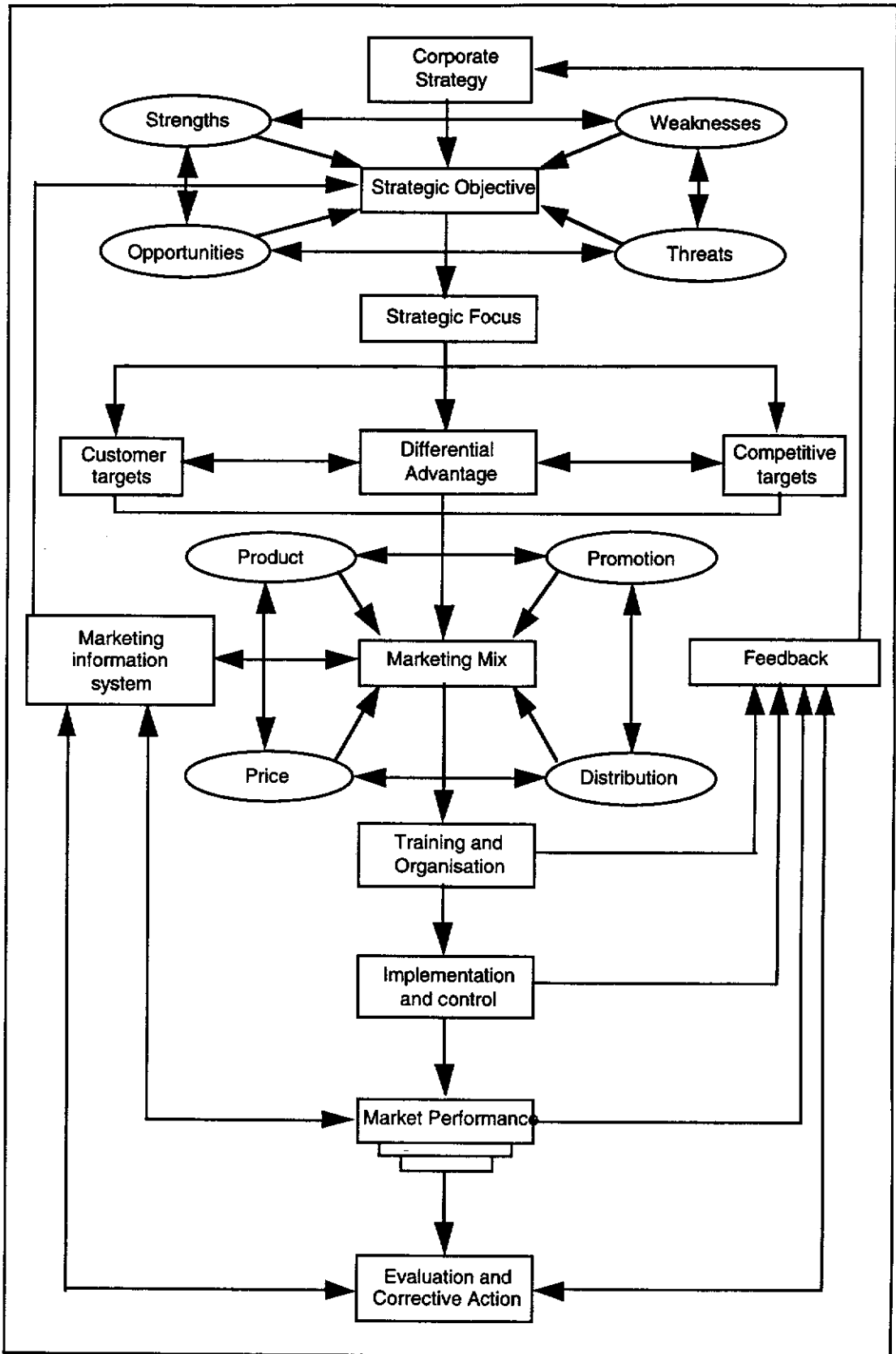
Figure 9-2
Process of Choosing and Evaluating a Strategy



Source: Rowe et al 1989:234

Analysis of both external and internal environment is important to arrive at strategic thrust which could lead to developing alternative strategies from which the most viable strategy can be selected. Alternative strategies are analysed on the basis of stakeholders, cost/benefit, etc. and an appropriate strategy would be selected for implementation. A selected strategy needs to be evaluated continuously during the implementation process and corrective measures should be taken should deviations be detected. On the other hand Papadopoulos (1989a) (Figure 9-3) showed that a SWOT analysis could be conducted to identify strategic objectives which could be evaluated for differential advantages vis-a-vis customer targets and competitive targets.

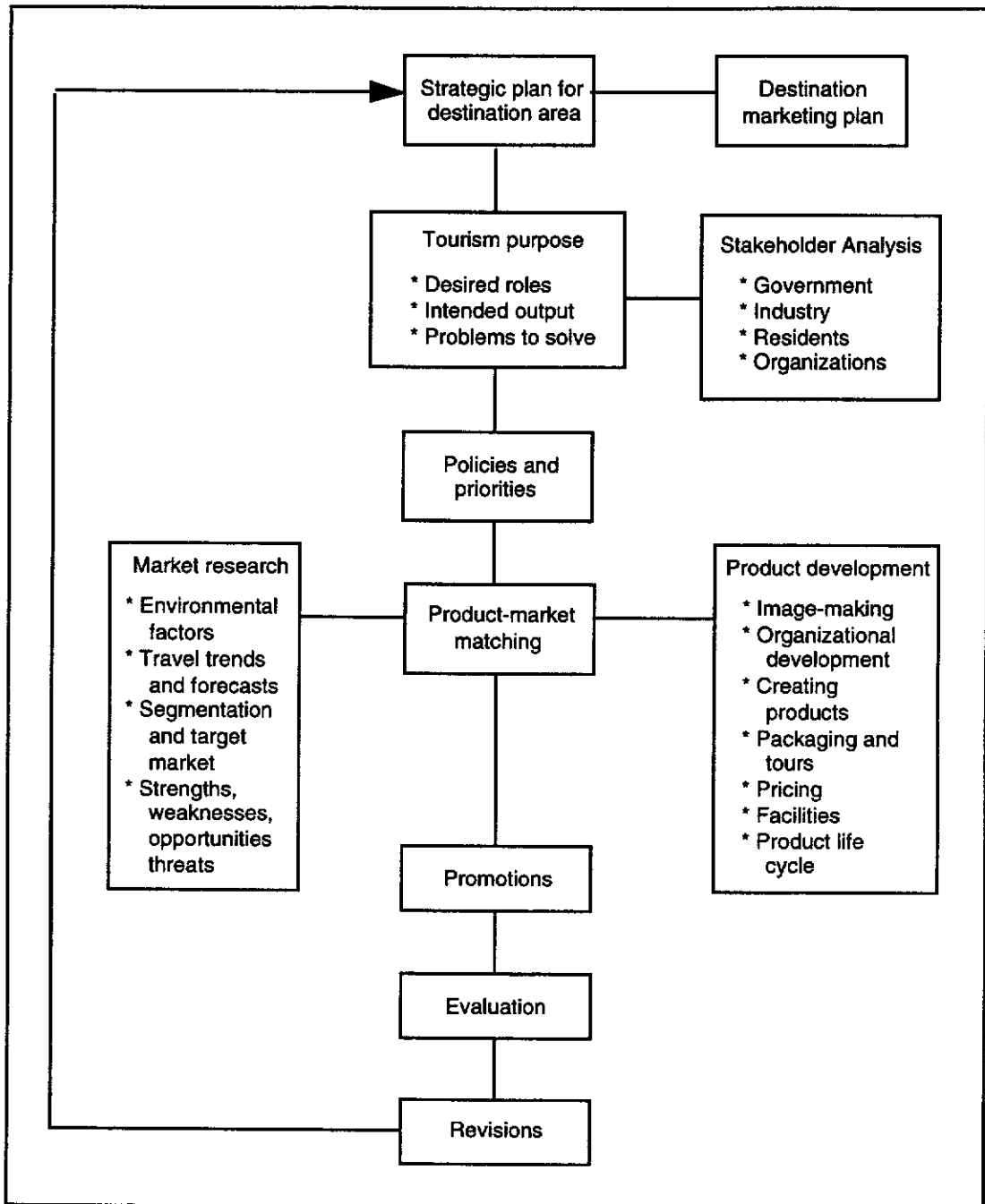
**Figure 9-3
National Tourism Organization (NTO) Strategy**



Adapted from Papadopoulos 1989a, p.43.

Once this is completed a marketing strategy can be developed through an evaluation of each one of the marketing-mix elements (the 4ps). Further, proper training and organizing of the staff needs to be in place to implement the strategies. Performance must be evaluated and corrective measures be taken. Again, the above model further reinforces the use of SWOT analysis and the need to develop a strategic focus where core competency lies. This is important to Ethiopia as assessment of the environment in developing a viable strategy is a new and untouched concept. Getz (1991) developed a marketing model for destination planning (Figure 9-4) which looks into tourism purposes, policies and priorities, product-market matching, promotion, evaluation and revision. At each level of the planning process there are certain factors that need to be taken into account.

Figure 9-4
Destination Planning and Marketing Model



Adapted from Getz *Festivals, Special Events and Tourism*, 1991:141

For example, when defining tourism purposes, a stake holder analysis needs to be performed. At the product-market matching stage, both market-research and product-development can simultaneously take place. The core tasks that need to be done by the Ethiopian tourism authorities to identify a specific tourist destination, be

it Gonder castles or Axum stelaes or the rift valley lakes, and define the purpose, identify stake holders and do market research to determine whether the product matches with the potential market needs.

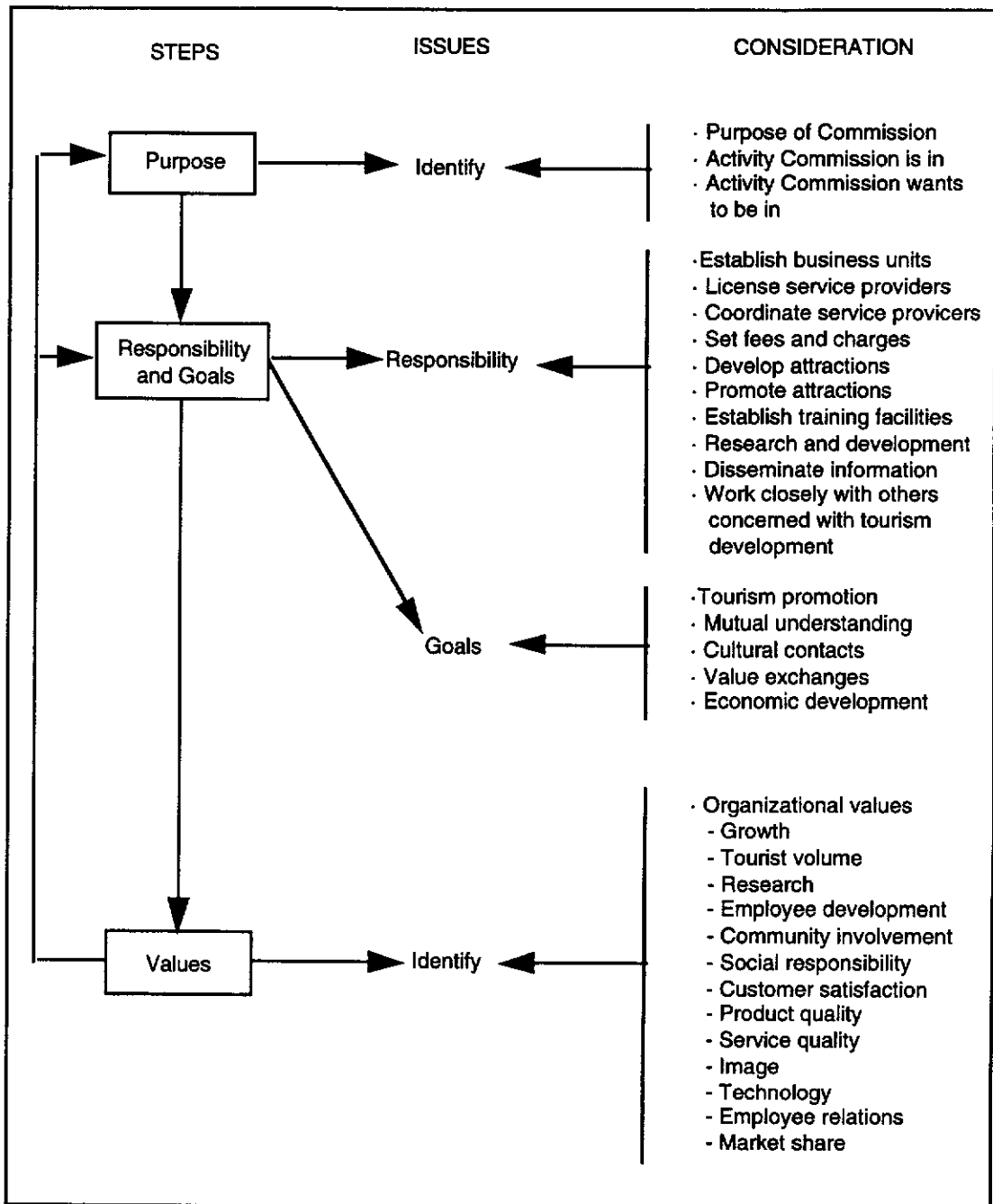
As might be seen from the foregoing models, no single model can be prescribed for particular situation. It depends on the needs and wants of the concerned body and the prevailing environmental conditions. At times all the models would be useful. At other times one or of the above models could be applicable. Depending on the specific situation, one can select the appropriate model and follow the steps prescribed or adopt section of the model to suit particular needs. Viljoen (1991:269) states that key issues in implementing strategies require detailed planning, efficient administration and strong leadership. The author further reiterates that another important aspect of strategy implementation is that it is advisable to target one issue at a time. According to Viljoen (1991:267) strategy implementation requires: (a) the acquisition and deployment of organizational resources; (b) the development of an appropriate organization structure; (c) the establishment of appropriate organizational systems, and (d) the development of a strategy supportive culture. In terms of developing a national tourism strategy, this approach has limitations. The model needs to accommodate the integration of a range of stakeholders such as government, quasi Government instrumentalities and private enterprise (local) as well as foreign investors. Stacey (1993:65) indicated that to implement formulated strategies organizations must (a) design a hierarchical reporting structure that is appropriate to the strategy they have formulated; (b) install and operate the management information and control system that will enable them to keep the organization on its planned path and install and operate reward systems for people that will provide the monetary incentives for them to carry out the strategy; (c) change the culture or belief of people in the organization to provide the non-monetary motivation for them to carry out the strategy, and (d) develop appropriate social and political behavior that will not block the implementation of the strategy.

With these points in mind, the tourism strategy that has been discussed in the foregoing sections need to be implemented in Ethiopia in the following framework.

9.3 Strategic Models for Ethiopian Tourism Development

It is imperative that the government should take the lead in the process and to effectively implement the strategies it first and foremost, must define the mission statement for the Ethiopian Tourism Commission. Such a statement should focus on the purpose of the Commission, its responsibilities and goals, and values. However, the government clearly has a number of agendas. This thesis examines the role of tourism in the present time. Encouraging tourists to visit Ethiopia could have other benefits. If one examines the current image of the country as shown by this research, then primarily tourists will to see the many positive aspects of Ethiopia could have a marked influence on other initiates, eg. fancy investment. Regardless of how pressed the government might be, a clear mission statement setting out the Ethiopian Tourism Sector must be developed. As Figure 9-5 shows, the first step of the mission statement is to identify the purpose of the Commission's existence.

Figure 9-5
Statement of Mission for the Ethiopian Tourism Commission

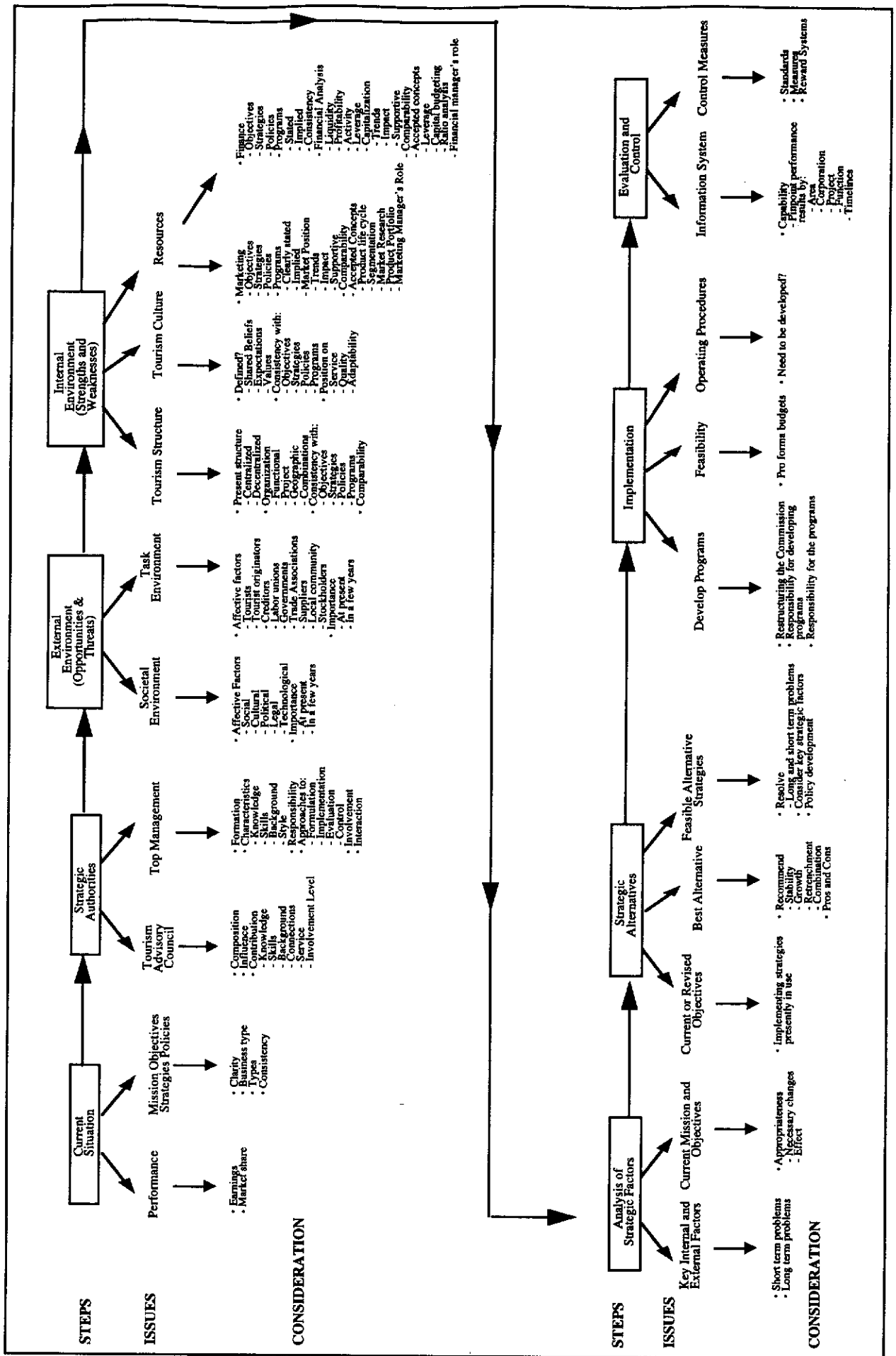


Once the purpose is determined, its responsibilities and goals must be identified and established. These responsibilities and goals lead to setting values or organizational cultures that would be followed. The strategic audit model helps the Commission to carefully analyze its current position in terms of internal strengths and weaknesses and external opportunities and threats. As explained earlier, statement of mission is important as it probes the Commission to ask itself what purpose it is established for

and what business it is in. The opportunities must be exploited while the threats must be turned into opportunities. This, of course, needs a thorough analysis of strategic factors through alternative strategies can be developed. Any strategy developed and accepted for implementation must be evaluated for deviation and corrective action, if necessary, must be taken. Having clearly defined the mission statement, the Commission's focus could be on making a strategic audit of the sector (Figure 9-6). This further clarifies the objectives, structural considerations, environmental analysis (both internal and external), strategic alternatives, etc. The goals set might include improving the image of the country.

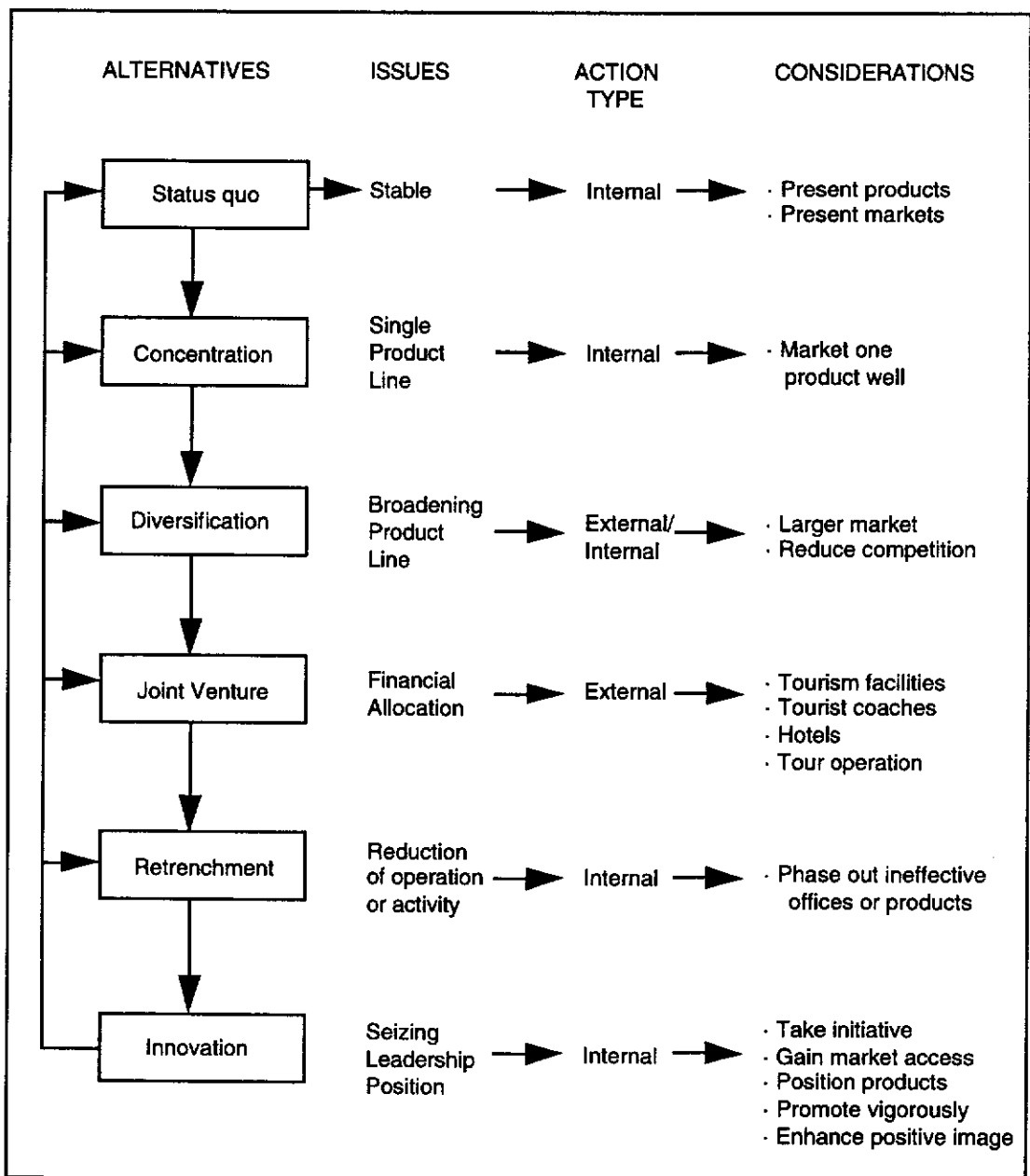
Each of the issues indicated has to be analyzed on its own merits and in relation to others. Strategy issues require that alternative strategies be developed. This means that the Commission must make decisions as to which alternative strategies would be adopted. In addition, the strategy needs to accommodate the expectations of the various stakeholders, eg. tour operators (local), Tourism Commission, government. As shown in Figure 9-6, the decision to maintain existing products and markets or to market a single product well or broaden product line, etc. rests with the Commission. The alternative strategy also suggests that investment in tourism facilities, hotels and tour operations requires external financial sources such as joint-ventures as the country has limited funds to develop tourism by internal sources only. Once again, it must be emphasised that a turnaround strategy is needed in that the image of the country has been impaired by political uncertainty and physical degradation through prolonged drought. Strategic alternatives should also focus on eliminating those administrative or operational sections which do not yield any benefits. For example, as discussed elsewhere, there are a number of hotels that continuously show a loss. The National Tour Operations and Travel Agency Corporation has also been over-staffed and showed negative growth as shown in earlier chapters. The government must be courageous enough to dismantle these inefficient operational areas and restructure more efficient ones.

Figure 9-6
Strategic Audit Model for the Ethiopian Tourism Commission



Innovative strategy alternatives require that the government should take an initiative to gain market access, to position tourist attractions, to promote them vigorously and to establish positive image of the country. As shown in Figure 9-7, action types can either be internal or external depending on the type of alternative strategies to be taken. For example, maintaining existing tourist attractions and existing markets is an internal matter, whereas the creation of a joint venture to invest in hotels, tour operations, etc. is an external activity.

Figure 9-7
Strategic Alternatives for the Ethiopian Tourism Development



On the other hand, diversification of both tourist product lines and markets could require both internal and external approaches. The government must make a choice between the various types of strategy alternatives. One or more alternatives can be chosen to be implemented simultaneously. However, the ideal choice would meet the capacity of the sector to carry existing and/or prospective tourists. Furthermore, strategy implementation requires that the country relentlessly assesses the values, constraints and capabilities; strengths, vulnerability and potentials through the situation audit. This is important as it requires that environmental analysis, the strategic role of tourism as well as the history of tourism in the light of regional trends are considered. This requires answers to questions such as the level of expectations of tourists, as well as what Ethiopia must do to attract international tourists must be addressed. Detailed analyses of the key success factors, vulnerability, stakeholders and, competitive analysis, etc have been presented in earlier chapters. The major thrust of strategic analysis is to present to the Government alternative strategies to choose from. One must understand that the strategy development is not a mathematical formula that stays forever once introduced. Strategy analysis is a dynamic process which requires continuous evaluation in order to match it to current and future directions. With the emergence of advanced technologies, tourists of today demand the best. To meet this demand, a country's tourism strategy must be updated continuously.

Any strategy developed may not necessarily be applied to different situations without modification. As Miller and Dess (1993) indicated, each strategy model has its limitations. However, selecting the factors that meet requirements is the responsibility of the Commission. As the foregoing strategy frameworks suggest, various steps need to be taken in the process of tourism development. Figures 9-8 to 9-11 further demonstrate steps in the process, their strategic issues and key considerations. For example, tourism development must be integrated into the overall development policy of the country. For the question "What are Ethiopia's

development priorities?" answers must be sought in the area of employment, foreign exchange earnings, societal development, economic growth, international understanding, and cultural development. An analysis of competitive advantage must discuss the question "What natural features does Ethiopia have?". In this regard, geographic features, natural resources, proximity to market, and attractions must be considered.

Figure 9-8
Strategy Development for the Ethiopian Tourism Industry

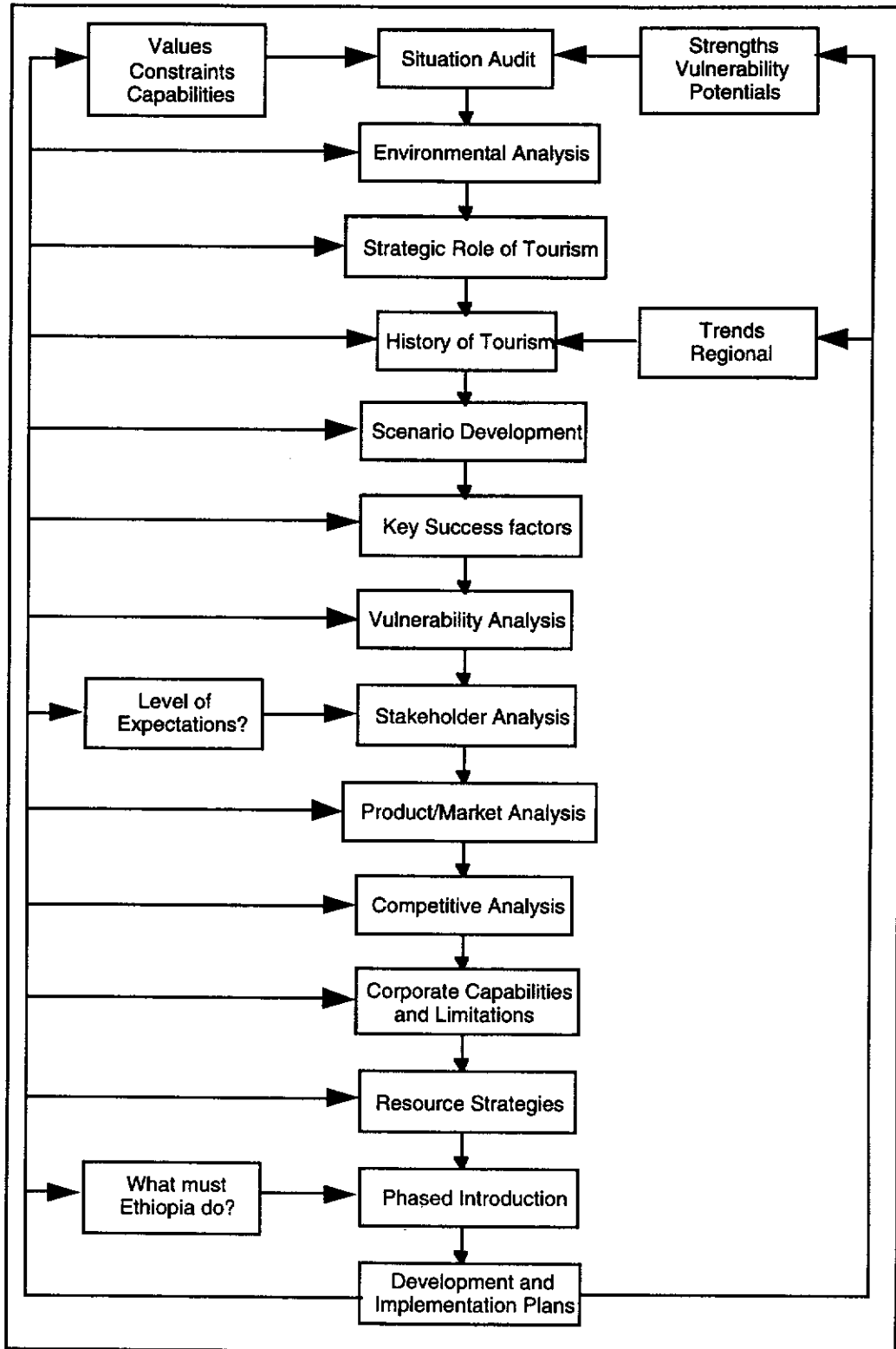


Figure 9-8 indicates that values of the Commission, constraints that impede on their strategy and capabilities including resources should be analysed together with

strengths, vulnerability and potentials for development. The situation audit is the key for all subsequent strategy development processes - environmental analysis through development and implementation phase. Any determination of tourism potentials seeks answers to types of development opportunities that exist - i.e. tourist attractions, existing/potential markets, the world economy and people's motivation for travel. The external threats must be analyzed in the context of Ethiopia's image, competition and the world economy in order to answer the strategic issue question "What external factors affect tourism development?". The industry's strengths and weaknesses need to be analyzed in order to answer the question "How capable is the tourism industry?". This focuses on the internal environment such as structure of the industry in the context of tourist products, markets, and technology; performances as well as capabilities such as managerial, financial, promotional, technical, etc.

Following this, the Commission must look into the strategic direction that must be pursued. The question "What kind of government role is required?" must be answered. This looks into infrastructural, budgetary, institutional, promotional and training aspects. Having set the strategy direction, the appropriate strategy/ies need to be determined. "How best can the government deliver support to tourism?" focuses on answering in each of the following categories: investment, image enhancement, promotions, facilitation of entry formalities, setting up of promotional offices overseas, encouraging private involvement, and preserving attractions. Finally, the implementation strategy looks into the issue of "Specific measures required to implement strategy" and attempts to examine policy formulation, institutional restructuring and action plan as in Figure 9-9.

Figure 9-9
Strategic Process for Tourism Development in Ethiopia

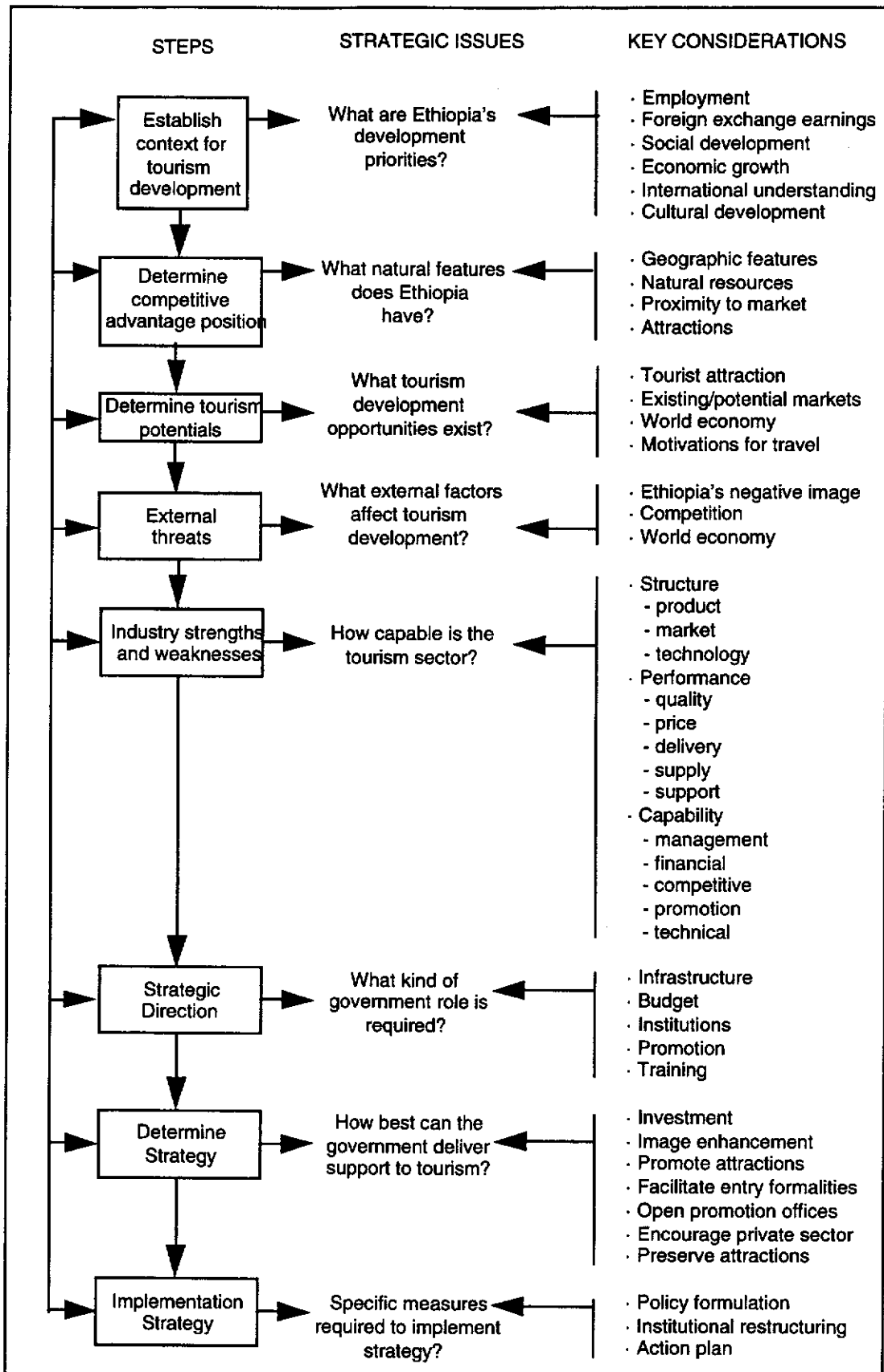
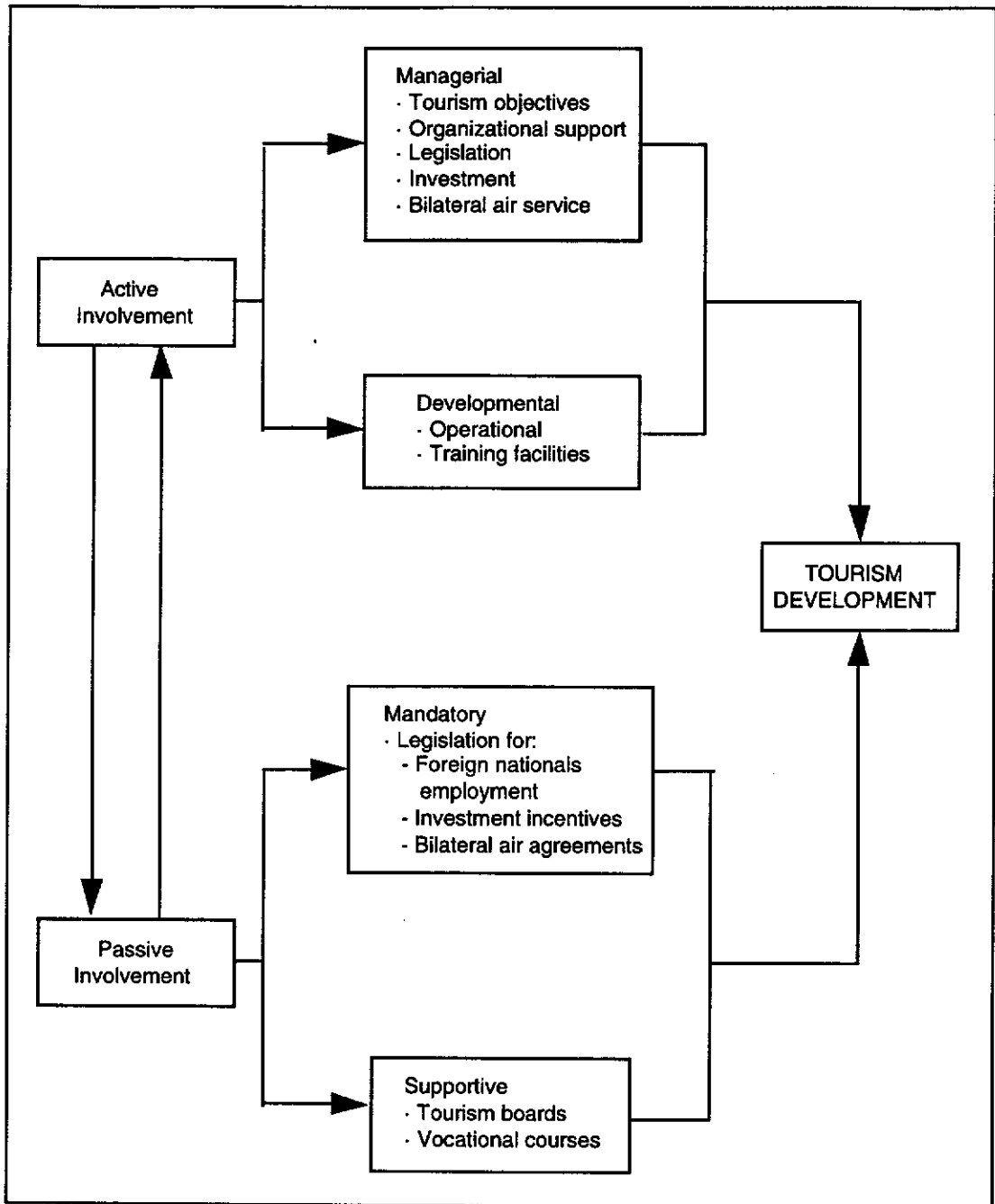


Figure 9-9 shows that certain steps must be followed to address strategic issues and key considerations required to address the issues. For example, the first step in addressing the issues is to establish context for tourism development. This attempts to identify what development priorities of the country are. Key considerations include employment, foreign exchange earnings, social development, economic growth, international understanding, and cultural development. Once these are addressed the next question attempt to identify what natural features the country has. Consideration is given to geographic, natural resources, proximity to markets, and attractions. This is covered under the second step regarding competitive advantage Ethiopia has over other countries marketing tourism. Each subsequent steps attempt to raise certain strategies issues which look into specific considerations applicable to the issue. The final step is developing implementation strategy which addresses specific measures required to implement strategy. This calls for policy formulation, institutional restructuring and action plan.

Any strategy would be futile without the full cooperation of the government of the day. The government must play a catalyst role as an active participator or as a passive participator as shown in Figure 9-10.

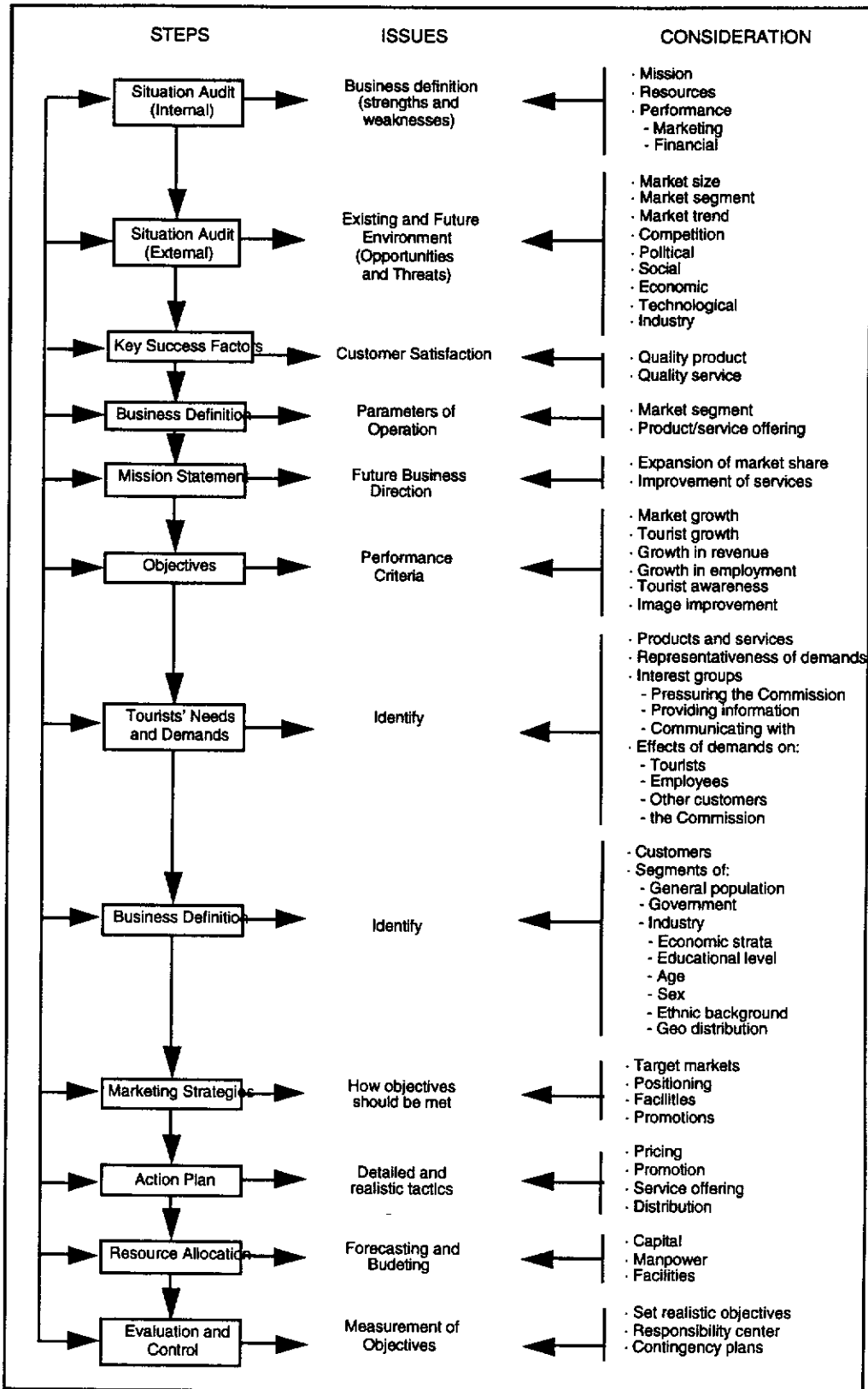
Figure 9-10
Strategic Model for Government Involvement in Tourism
Development in Ethiopia



Active involvement may take managerial and developmental forms. Managerial involvement includes setting out tourist objectives, providing organizational support, legislating, investment and air-services agreements. Another aspect of active involvement focuses on developing tourism by directly involving operational

activities and providing training facilities. The government may involve itself in tourism development passively. This would be reflected on a mandatory as well as a support basis, legislation for the provision for foreign national employment in the sector, private sector investment incentives, as well as air agreements between nations would need attention. These actions are not taken solely for tourism purposes. The legislation is intended to benefit all economic sectors, including tourism. The supportive involvement requires the government to create a tourism board and set up vocational courses that will benefit the tourism industry. Government involvement in tourism development is important. Tourism policy needs to be formulated by the government. Necessary infrastructure is provided by the government. Investment policy is issued and monitored by the government. Private and joint venture participation is initiated by the government. The above model is a useful tool for the Ethiopian tourism development as it clearly shows government role. Finally the Marketing Plan Model Figure 9-11 attempts to look into issues that need to be addressed by the government. These include a situation audit, key success factors, business definitions, mission statement, objectives, tourist needs and wants, marketing strategies, action plan, resource allocation and evaluation and control.

Figure 9-11
Strategic Model for the Ethiopian Tourism Marketing Plan



The situation audit looks into internal as well as external environment. The internal audit should identify the sector's strengths and weaknesses. These focus on the mission, resources, and marketing and financial performances. The external audit must be carried out to address such issues as political, economic, technological, industry, competition and market size and segment. The business definition looks into the parameters of operations such as market segment, product/service offering, customers. Segmentation can take the form of general population, government and industry. Objectives of the strategy include market growth, tourist growth, growth in revenue, growth in employment, awareness and image improvement. The identification of tourist needs considers such elements as products and services, representativeness of demands, interest groups and effects on demands on tourists, employees, other customers and the Tourism Commission. The marketing strategy looks into ways the marketing objectives are to be met - that is. target markets, positioning of tourist products, provision of tourist facilities and promotion of attractions. Action plans are required to address detailed and realistic tactics regarding pricing, promotion, service offering and distribution. These require allocation of resources such as capital, manpower and facilities. Finally the strategy should set standards to measure whether the objectives are met, to set responsibility centers and to develop contingency plans. Developing various strategies and implementing them is a long term process. Certain strategic issues must take precedence over others through a stepped strategy as shown in Table 9-1.

Table 9-1
Stepped Strategy for Ethiopia's Tourism

	Year 1	Year 2	Year 3	Year 4	Year 5
Infrastructure			-----	-----	-----
Sites Development	-----	-----	-----	-----	-----
Accommodation	-----	-----			
Transport Facilities			-----	-----	
Promotion	-----	-----	-----	-----	-----

Table 9-1 shows that development priority could be given to sites, accommodation, and promotion in Year 1 as these are very critical for any tourism inflow. Tourist facilities and infrastructure could be upgraded in Year 3. All areas require a continuous monitoring in order to provide quality services to the prospective tourists. In short, a strategy has to be implemented in order to yield results. The mere development of it and keeping it in the bottom drawer will not constitute development.

9.4 Conclusion

Strategy development and its implementation requires a corporate culture that is receptive to changes. Management must be aware of potential changes and their consequences. Strategy development and implementation involves the proper understanding of both internal and external forces that impact upon it. A sophisticated strategy will have no meaning unless it is supported by the key role players in the organization. Organizations need to enlist the full participation of their staff in developing strategies. Focus should also be given to external stake holders such as tourists, the government, the community, competition developing strategies. The government is the key role player in legislating the appropriate guidelines, in allocating resources, in developing international understanding and in providing the necessary infrastructure. Ideally, equal emphasis could also be given to all the key

tourist attractions and facilities such as historical sites, national parks etc. as shown in the foregoing strategy models, as well as developing the total infrastructure. However, taking into account limitations such as finance, know how, etc, a stepped approach to various strategic issues would be more appropriate

CHAPTER 10

IMPLEMENTATION STRATEGY

Strategy implementation is as important as strategy formulation, if not more so. Although executives may believe that coming up with a strategy is more important than implementation, studies show that top management of an organization has to pay as close attention to strategy implementation as they do to strategy formulation [Sandelands (1994), Schmidt (1994)]. Atherton (1993) indicated that the best strategic plan is but an academic exercise if it is not effectively implemented. Implementing a tourism strategy is not an easy task. There must be flexibility to accommodate changes that may be necessary. Some of the basic issues with regard to implementation and control according to Piest and Ritsema (1993) are: (a) using the business mission as a management instrument; (b) developing a control system that is directed toward the future; (c) discovering the limited value of financial figures; (d) finding information that is really meaningful, and (e) making a 'what if' analysis. Strategy implementation should also take into account the external environment such as geographic proximity to the markets. As Roth (1992) explained, a basic task of strategy implementation concerns the geographical location of the organization's functional activities and the integration of these activities across locations. Some studies suggest that many executives under-manage strategy implementation. Huston (1992) identified three reasons for this: 1. many have an elitist attitude; they believe that thinking up a strategy is far more important than implementing it; 2. most executives are far more comfortable with strategy development than with the more human side of implementation and never achieve the potential of their organization; and, 3. most do not understand their responsibility for honing and managing a process for strategy implementation.

Go, Milne and Whittles (1992) maintained that effective strategy implementation is achieved by managing the interaction, allocation, organization, and monitoring of

tourism processes on each implementing level. However, strategy implementation may fail for any of the following reasons: (a) objectives or tactics are mistaken for strategy; (b) the strategy is not practicably implemented, and (c) the strategy is not owned by those who implement it [Giles, 1991]. Strategy implementation entails major changes in the organization and middle- and operating level staff must be fully informed of the organization's chosen direction [Dodson et al, 1993, Floyd and Wooldridge, 1992]. While Chapter 9 focused on developing strategic alternatives for the Ethiopian Tourism Commission, this Chapter suggests areas required for implementing the strategies discussed. To implement any strategy effectively, the tourism industry in Ethiopia requires change in the image of the country. Ethiopia through protracted wars and famine has been portrayed as a destination to be avoided at any cost. The political condition should be stable enough for prospective tourists to consider it one of their destinations.

While image is one area that the government must work hard to improve, another equally important area of focus should be the marketing of the country. Both pull and push strategies can be adopted through television advertisements, documentaries, brochures, and more importantly involving famous personalities to portray the country as a safe tourist destination. For example, Paul Hogan's Crocodile Dundee film boosted Australia's tourism inflow dramatically in the early to late 1980s. Marketing strategy should focus on the intermediaries - the tourist wholesalers as well as travel agencies. These are the bridges between potential tourists and the tourist destination. As they are the gatekeepers, they should be convinced that the country is safe and does provide exceptionally good quality tourist products. The Ethiopian Tourism Commission has to organise a familiarisation tour for wholesale tour operators from major tourist markets. They should also be provided with adequate promotional materials.

Ethiopia has a number of diplomatic missions overseas. They may have specific assignments but may not include the task of promoting the country as a tourist destination. The opening of offices for commercial attaches/councillors and/or tourism promotion in as many countries as possible would enhance the promotional activities within these countries. Another strategic area that needs to be looked into is the total hospitality industry. The existing accommodation is entirely insufficient at current level would be a handicap in the event an international tourist inflow increases dramatically. Although there are private small hotels coming up in major cities, an overall accommodation inventory must be conducted and appraised accordingly. The existing hotels should be refurbished. Those hotels which were initially constructed for some other purpose should be given top priority. All accommodations should be given a standard. This is very important to cater to different needs of tourists in a segmented market. To survive and attract tourists Ethiopian hotel industry needs a turnaround strategy including franchise and joint venture agreements with top international hoteliers. Murray (1992) indicated that, "as the hotel industry is in turbulent times ... the trends that are dictating current action have been identified as globalising, franchising, and segmentation. Thailand, for example, was engaged in establishing major hotels of international class including more than two hotels in Bangkok which are suited for international tourists [Cheatham and Cheatham, 1990].

Private sector investment in the industry is extremely low. Lack of genuine investment policy, the unstable political condition, insufficient local capital, etc. has greatly affected development in tourism. This trend ought to be reversed. The private sector must be involved to invest in tourism sector. As the Indian Ocean Newsletter (1995) reported, while the Government's Privatization Agency, by selling state-owned enterprises, was able to generate a US \$53.5 million revenue of which US \$16 million was from the sale of a hotel, a restaurant, and a flour mill, a conducive atmosphere must be created for the privatization process to continue in a

more concerted manner. to happen. Where the capital required for development is huge, government must encourage joint ventures. Investment policies must be appraised to accommodate the requirements of potential investors both from domestic sources and from overseas. So far, training for the tourism sector has been confined to the Commission's internal training Institute. This has some drawbacks. The Institute is under the control of the Commission and is, therefore, limited in its outlook. As the hospitality industry has to depend on this small institute catering for the sole needs of the Commission, this is not the right way to do things. For this reason a formalised training facility should be developed. The existing Catering and Tourist Training Institute can be used as a spring board and should be of international standard and independent of the Tourism Commission. The Utali College of Kenya is a good example. Addis Ababa University can play an important role in advising on syllabus content and providing staff and services. To effectively implement the strategies, the government is required to pay close attention to the state of the infrastructure in the country in general and in tourist areas in particular. The main area of focus would be road construction and/or maintenance, airports, air strips, etc. Many roads are in poor condition and impede easy travelling.

Infrastructure development also requires that the country is linked with major international airlines from tourist generating countries. Reciprocal air agreements must be in place for the efficient connection to and from various destinations. Another focus of infrastructure should be the improvement of communication systems. The Ethiopian Telecommunications Authority has an excellent international connection. This must be maintained and appraised in order to meet the growing demand of efficient communication in the 21st century. For example, thought should be given to the accessibility of information via internet. While good international connection is vital, consideration should also be given to internal communication. Availability of and access to telephone lines within the country is very low. This situation should be rectified.

Ethiopia cannot afford to market its tourist products to many countries at this stage, for it will entail the use of exorbitant resources which are very scarce. Besides, the range of tourist products that would create enthusiasm from such countries is very limited. It should also be borne in mind that neighbouring tourist destinations are also targeting many of Ethiopia's tourist markets. A staggered approach targeting the most important markets is essential. For example, in order to boost the number of Canadians visiting South Dakota, the South Dakota Department of Tourism has been advertising in the newspapers and on television in the Canadian provinces of Manitoba and Saskatchewan [Wymar, 1994]. On the other hand, the Australian Tourism Commission allocated A\$100 million in advertising to attract international tourists from Japan, Asia, North America and Europe [Lee, 1995]. Therefore, it is imperative that the Ethiopian Tourism Commission should focus on selected countries that would definitely respond to its marketing of a very few selected products which can be positioned as unique, compared with neighbours' products. Designing packages with the countries in piggyback is a better first-step approach. This in turn would also dictate the selection of airlines to and from the country.

The implementation of the strategy should also consider the significant roles suppliers to hotel groups play. Local suppliers, as well as suppliers from overseas, must be encouraged to participate in this big industry. Proper guidelines should be established for their involvement. A proper inventory of both local and overseas suppliers of such materials as linen, cutlery, toiletries, etc must be taken. Standards should be laid down for the quality of the supplies. Mode of transport is important when considering appropriate transport facilities for tourists. Buses, taxis, coaches, etc. are needed in sufficient numbers and in good condition. Transport routes should be drawn clearly and be made available for public use. Taxis need to be regulated and their performance must be monitored in order to avoid indecent behaviour on the part of the drivers towards the passengers. This requires unambiguous code of operations which specifies the rights and responsibilities of transport providers.

International tourists speak diverse languages. To cater for these tourists' needs, the Ethiopian Tourism Commission is required should ensure that there are adequate numbers of multi-lingual tour guides and front-office staff in hotels who are motivated to serve the tourists. These guides should be trained not only on language fluency but should also be thoroughly trained in cultural sensitivities. A case of the 1980s China would be a good example. After an initial success of the international tourist inflow, the sudden drop in international tourist numbers was attributed mainly to lack of tour guide motivation. Cai and Woods (1993) reported, "foreign tourists were more dissatisfied with their foreign guides' attitude and lack of enthusiasm toward their job than they were with any weakness in language, history, or cultural skills". Jafari and Way (1994) wrote, "... hotel operators should take upon themselves to supply their personnel with multicultural training, particularly paying attention to language, culture, and symbols." Many international organizations, such as the United Nations Economic Commission for Africa, the United Nations Development Fund, the Organization for African Unity and other international and regional organizations have their head offices in Addis Ababa. In addition, there are a significant number of Non-governmental Organisations (NGO) that serve various sections of the country. This gives Addis Ababa a very good chance of being the hub of Africa. As a pivotal position, the country can become a benchmark for neighbouring countries' capitals.

Ethiopia may not prominently feature as a final tourist destination. Factors adversely affecting its position could include the poor image, inadequate facilities, almost non-existent international promotion, and poor infra-structure. For example, Berman (1994) wrote that the key success to Cuba's success as a tourist destination lies in its ability to develop the U.S. market so as to capture a larger share of the tourism dollars being spent in the Caribbean. Ethiopia can immensely benefit if and when she joins a number of tourist receiving countries in the region. A tourist circuit comprising countries along the Red Sea and the Indian Ocean such as Egypt, Eritrea,

Kenya, and Tanzania would be beneficial for the countries in that region. The formation of such a circuit requires commitment on the part of all concerned countries. Ethiopia can play a pivotal role in convincing these countries to work together for joint promotion, for ease of border crossing, for visa requirements and currency exchanges, transport facilities, training, etc. The Asia Pacific region's rapid tourism growth could be a good example. As Mak and White (1992) indicated the region's tourism growth was attributed to the increase in intra-regional travel among residents of the Asia-Pacific countries.

Another major area of concern is the possible use of sea routes. As Ethiopia is landlocked this opportunity will only be realised if and when the Red Sea route can be used for cruise ships from Egypt, Saudi Arabia, Yemen, etc. carrying tourists from these countries to both Eritrea and Ethiopia. As Project and Trade Finance (1993) article indicated Eritrea, with a population of less than 3 million, is not in itself a big destination, but its geographical position on the Red Sea Coast gives it easy access to the markets of Saudi Arabia, Yemen and the 100 million people of the Red Sea Region. Hence, the joint development of a strategy to capitalise on the Red Sea as a strategic route for cruise ships, would advantage both countries. Ethiopia, therefore, needs to work harder than it has done so far in order to capitalise on the opportunities that lay ahead. Ethiopia has an extensive inventory of tourist attractions and her long-term strategy should be to develop these. In the shorter to medium term, the Ethiopian Tourism Commission should focus on a few significant attractions and market these effectively, eg. the national parks, historic sites, the Rift Valley lakes region. Priority promotions should be given to the most accessible attractions while the less accessible areas are developed in subsequent periods. Special attention should be given to eco-tourism as what the country is trying to offer the international tourists must not be in danger. Although eco-tourism may not be panacea for developing countries, as African Business (1995) writes, "...it is here to stay and

Africa needs to keep a watchful, regulating eye if it is to put further money into local economies and help conservation”.

Strategy implementation cannot be successful without the full involvement of the government. The Council of Ministers is required to support the initiatives of the Ethiopian Tourism Commission in marketing products. The appraisal of the existing Tourism Commission structure with a view to upgrade it to ministerial level is of paramount importance. Many countries of Africa which have successful tourist development have positioned the tourism portfolio at ministerial level - thus providing it with all authorities and responsibilities for tourism development. Therefore, the Ethiopian Government should also upgrade the Ethiopian Tourism Commission's portfolio to ministerial position so that it could be represented in the Cabinet by a Minister. As discussed in the preceding pages, in order to successfully market its tourism attractions the Ethiopian government should put the following major items in place. (a) restructure - many countries which have been successfully marketing their tourist products assigned their tourism portfolio at Ministerial level. This gives the official in charge equal voice in the Cabinet with other Ministerial positions and re-enforces their plans smoothly through the Ministerial levels, (b) image - countries with negative images due to political reasons or otherwise cannot sell their products. International tourists prefer to spend their times in very secure places. Due to political problems, and also due in part to the recurrent drought Ethiopia would not feature in the international tourist destination map for some time in the future. This negative view can only be reversed when the government ensures political stability in the country. To bring about this stability the government must work towards constructive engagement with elements of the opposition and implement the democratic processes in the entire country. A recent report about the number of tourists arriving in the country gives an indication that with improvement of the country's image tourists would come in greater numbers.

Survey results show that although potential for tourism development is great the country suffers from image problem. Lack of political stability coupled with the 1984 famine makes Ethiopia undesirable destination. In addition, poor or non-existent tourism promotion overseas is another hurdle the survey revealed. Most of the Sub-Saharan African countries surveyed indicated that they do have tourist promotion offices at least in one tourist generating country. Ethiopia depends on diplomatic missions abroad to provide information. Allocation of tourism promotional budget is another important area reflected in the survey. Unless adequate budget is allocated it is impossible to promote the country's tourist products to international travellers. Furthermore, the survey showed that for tourism in order to succeed private sector participation is paramount. All Sub-Saharan African countries responded to the survey indicate the significance of private sector investment in tourism sector. Public sector could only play the leading role through policy formulation and control.

In order to effectively formulate tourism policy a country's tourism portfolio needs to be at ministerial level. Most African countries' tourism sector is represented at ministerial level in the central government. Ethiopia still lingers with the notion of a tourism commission. Further to this, many countries do have tourism development board which oversees the operational aspects of the sector. It acts as a bridge between the private sector and the public sector in tourism development. Another survey result shows the need for joint promotion of their tourist attractions through tourist circuits. This enables many countries to pull resources to jointly promote internationally. The Eastern and Southern African countries effectively use this system. For example, Kenya with one or more of Mauritius, Rwanda, Tanzania, Uganda, and Zanzibar; South Africa with one or more of Botswana, Comoros, Mauritius, Namibia, Seychelles, and Zimbabwe. The survey result suggested that Ethiopia could tie up with Kenya and or Egypt. Ethiopia could jointly work with Eritrea, Kenya, Djibouti. Still another area the survey touched on was the need for

efficient tourism training institution. While many African countries either have a vocational training institution others provide in-house training and still others send their trainees overseas. This is one area where countries can join ranks and form a centralised training scheme. As regards tourist attractions, many countries of Sub-Saharan have similar stock such as wild life, scenery, culture, etc. It is imperative that each country specialise in areas where it has competitive advantage over others. In conclusion, the Ethiopian Tourism Commission should recognise the value of successful strategy implementation and work towards achieving this. The six areas of vital importance to long-term, successful strategy implementation - market, people, finance, operation, adaptability, and environment must be used to measure the results of the performance as suggested by Lingle and Schiemann, 1994. The Commission has the enormous task of promoting the country to international tourists. It should therefore weigh all strategic alternatives against the prevailing conditions and future scenarios and then implement strategies that most suit the current and future needs of the country in respect of tourism development.

CHAPTER 11

SUMMARY, IMPLICATIONS, LIMITATIONS AND CONCLUSION

11.1 Summary

This study is concerned with the development of a tourism strategy for Ethiopia. It has been shown that international tourism is an economic sector that is growing at a fast rate. Countries with rich natural and man-made attractions have been benefiting from tourism provided they have stable political conditions, adequate infrastructure, facilities and aggressive marketing, as basic pre-requisites. Many less-developed countries have benefited from tourism and Kenya, Egypt, Zimbabwe, and Tanzania have given top priority for tourism development and as a result, are hosting an ever increasing number of international tourists every year. Other African countries, such as Mauritius, Botswana, the Gambia have also been benefiting from sound strategies. As is evident from the research results in the previous sections, those countries have placed a great deal of emphasis on this sector.

Ethiopia has a lot to learn from them. Following the definition of tourism development problems, a thorough investigation of tourism development in Ethiopia was made. This was because Ethiopia's abundant tourist attractions have not been exploited to the benefit of the country. Due to the negative image of Ethiopia as perceived by the outside world, it has only marketed the limited areas that have been developed. Civil wars have wrecked the economy, damaged the country's image and frightened potential tourists off. The famine of the 1980's was another factor that contributed to this negative image. While, natural calamities may, from time to time, affect the country, man-made problems need to be averted without delay. The country needs to show to the outside world that it is stable and free from any visitor. This study emanated from reports of such adverse effects in the country. Ethiopia will benefit from tourism in the long term for as the motivation and tastes of tourists change over time, Ethiopia will be in a position to provide discerning tourists with

unique attractions. The study was conducted in Ethiopia and in Australia and included both secondary data searches as well as questionnaire surveys and personal interviews. Sub-Saharan African countries were also included in the the questionnaire surveys.

A strategic analysis of Ethiopia's situation in terms of tourism development produced several conclusions. First, the perception of Ethiopia abroad is very negative. This is due to the protracted civil wars in the north of the country which for many years contributed to famine situations in the country. The political situation also leaves a lot to be desired. Second, Ethiopia's development priorities have not embraced tourism. Rather more focus was given to non-productive sectors such as the central bureaucracy, defence and security, and the like. Tourism has been marginalised. As other countries in the region have shown, tourism occupies a pre-eminent position in allowing for a strong boost in foreign-exchange earnings. Third, the lack of infrastructure and facilities has also been another drawback. There has not been sufficient capital to invest in tourism facilities. Fourth, for over two decades, the government has been the sole provider of tourism facilities. This handicapped growth in the private sectors. Public ownership of means of production was a hindrance to tourism development.

The country needs to move rapidly into the tourism market. This will best be achieved by the rapid introduction of contacts, know-how, and technology that outside operators can offer. Whether this be on a joint venture, commission or royalty basis the end result will provide for a speedy transition for Ethiopia to become a major regional tourist destination. Fifth, Ethiopia has not lined herself up in international promotions. There has not been a single tourist office representing the country in overseas markets. Even the major markets of Germany, Italy and the United Kingdom have depended on travel agencies' versions of Ethiopia's attractions. Sixth, tourism policy issues have not been very seriously considered in

Ethiopia. A few sponsored studies focused on the marketing aspects and even these were not implemented as the studies have not taken the unique situation of the country into consideration.

Surveys showed that Ethiopia's tourism development would be effective if the countries in the region develop a regional tourist circuit. Kenya, Tanzania, and Zimbabwe can best serve this purpose through the proposed Cairo-Gaborone African highway program. Ethiopia would greatly benefit from such a circuit by forming a similar circuit with Eritrea and possibly Kenya. Focusing on tourist product each country has a competitive advantage the parties can benefit through joint promotion of their attractions. The position of the Ethiopian Tourism Commission needs review as most countries in Sub-Sahara have ministries of tourism which have wider responsibilities. The present of tourism promotion offices abroad is also very important. Survey results showed that most tour wholesalers have not received a single promotional material from Ethiopia while many African countries provide these wholesalers with the necessary promotional materials.

The study looked into the marketing of tourism in general and of Ethiopia in particular. A case study was conducted on Kenya to examine its policies. The study in the final stage suggested a framework for tourism strategy implementation. The major issues were the need to define the mission, objectives, goals of the industry, the need for government involvement in tourism development, the introduction of appropriate legislative procedures, allocation of resources - human, material, capital, and the need to develop a marketing strategy, the necessary institutional restructuring, the decision to choose between status quo and diversification, the need to support tourism development with appropriate incentives.

11.2 Implications

This study has attempted to develop a model of tourism development strategy for Ethiopia. The approach and the output thereof have both academic and practical implications. First, previous studies have not thrown light on strategy frameworks applicable to Ethiopia in tourism development. Second, tourism development in less-developed countries mainly focused on the marketing aspect and little attention was paid to the strategic aspect. This study has looked into the issue from strategic points of view. Third, this study further brought to light the various Sub-Saharan African countries' involvement in tourism development - from allocations of resources to manpower development, to promotion, to identification of tourist attractions. Therefore, the model developed in this study is of particular relevance to Ethiopia and can also benefit the Sub-Saharan African countries.

11.3 Limitations

Many factors were taken into account in evaluating the results of this study. First, although a great amount of literature was present, it however, was not possible to find any strategy framework relating to less developed countries, particularly Ethiopia. This study, therefore, heavily depended on interviews and questionnaire surveys. The second limitation was that statistical data on tourism in less-developed countries, and in particular in Ethiopia, were not up-to-date. The data lags many years behind other developed tourist destinations. Even the available data were not consistent and varied from source to source. Thirdly, since the coming to power of a new 'transitional' government in Ethiopia in 1991, information from officials in the Ethiopian Tourism Commission has become virtually impossible. Numerous requests for information were ignored.

11.4 Conclusion

This study developed a tourism strategy model to be used by Ethiopia and could also be used as a framework by other less developed countries. Third World countries

are faced with immense problems. Some think that tourism development is a panacea for all their problems. While a few benefited from tourism, it generally does not solve many of the problems of a country. However, an integrated approach to tourism development by using proper strategies would complement the economic development of the country. Paramount however, is that as tourism is a very susceptible activity, the country must have a positive image to appeal to potential tourists. Stable political conditions, security, adequate tourist facilities, accessibility, and friendly people are assets for a country venturing into tourism development. Finally, any strategy for its implementation requires the full commitment of the government and those concerned with it, cooperation of the various public and private sectors, and the community at large. As almost all attractions are located away from the main cities and towns, grass-root levels of participation of the community are important. Any decision made in developing tourism should pay attention to the preservation of cultural and traditional values of the community at large. Co-operation at departmental level is also most important. Tourism is an area which affects governmental departments such as Agriculture, Industry, Labor, Foreign and Internal Affairs, Finance, etc, their involvement will enhance its development. The private sector can be involved by investing in areas which can cover the establishment of travel agencies, tour operation, hotels, motels, gift shops and related activities. The government can play a facilitating role.

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APPENDIX A
RESEARCH INSTRUMENTS

4 April 1990

The Chief Commissioner
Ethiopian Tourism Commission
PO Box 2183
Addis Ababa
ETHIOPIA

Dear Sir,

Re: Research Project Proposal

We are currently exploring the possibility of conducting a major research project which we believe would be of direct benefit to your organisation. Mr Teklehaimanot Shanka, an Ethiopian national is a Doctoral student at Curtin University of Technology, Perth, Western Australia.

Mr Shanka is currently enrolled in the Doctoral Programme (Business and Administration) at Curtin University of Technology. He obtained from this University his Postgraduate Diploma (Business) and Master of Business (Marketing) in 1988 and 1989, respectively. He has been working for the Ethiopian Relief and Rehabilitation Commission. His studies are sponsored by the Australian Government.

Curtin University of Technology

Curtin University of Technology was established in 1987 by taking over all responsibilities that had been mandated to its predecessor, the Western Australian Institute of Technology. Curtin University is the third largest university in Australia with the biggest business school. Some eight hundred students pursue their studies in the postgraduate programmes.

This university has developed close ties with external communities for several years. Students are encouraged to develop pragmatic approaches in their areas of specialisation, and the study detailed in this letter is in line with that philosophy. [Details of the University and the Division of Business and Administration are appended for your easy reference.]

Research Topic

Teklehaimanot's research interest is on the impact of Marketing of Services. Under my supervision, he is working on his proposal for his Doctoral thesis on a topic entitled:

“THE DEVELOPMENT OF AN INTEGRATED STRATEGY FOR SERVICES MARKETING IN THE TOURISM INDUSTRY WITH SPECIFIC REFERENCE TO THE ETHIOPIAN CONTEXT”

Aims of the topic

The topic will focus among others on:

- The examination of the concept of SERVICES MARKETING as applied by the institutions engaged in promoting tourism
- Making a comparative analysis of the services marketing approach practiced by relevant institutions
- Investigating strategic approaches used by the service marketers in the sector to meet the demands of their customers
- Developing a strategic plan that will be applicable to the industry as a whole.

The above is by no means an exhaustive list of areas to be covered. There may be significant areas that need attention as the study progresses.

Benefits of the Study

Service industries are becoming the main sources of employment and revenue. Such industries as tourism, banking, insurance, transport, catering, contribute significantly to a country's economic development.

The movement of the world economy from a predominantly manufacturing industry to one of service industry helps institutions involved in the services to re-evaluate their performances and to redesign strategic plans to meet changing customer needs.

Services marketing in the tourism industry provides opportunities to create more jobs in the chain of activities and further improves the country's foreign exchange earnings. Along with these lines comes the appreciation of the historic and cultural heritages of the people through the smooth interaction of people of various cultures. Services marketing in the tourism industry further enhances the notion that the world is a small place and that tourism brings mankind into closer contact.

The aforementioned and similar points will be thoroughly investigated and the findings will be used as bases for developing a strategic model for services marketing in the tourism industry of developing countries. The model so developed will be tested in selected countries to ensure its applicability.

Availability of Findings

The findings of this study will be made available to your office and through your office to those institutions involved in the study.

Having briefly outlined the objectives and benefits, we/I would like to request your permission to go ahead with the study and to enlist your assistance in advising institutions directly and/or indirectly involved in the promotion of tourism in Ethiopia to fully participate in it.

I am sure you understand the benefits of such a study, however, to be meaningful, we will require the close co-operation of several departments and organizations in order that a significant and satisfactory conclusion will be reached.

Should you have any queries, we will be pleased to provide you with the necessary information. We can be reached at:

Telephone	(09) 351-7292
Telex	AA 92983
Fax	(09) 351-2378

I/We look forward to hearing from you at your earliest convenience.

Yours sincerely,

Dr Fred Frost
Associate Professor
School of Management

30 April 1990

Comrade Dawit Getachew
The Chief Commissioner
Ethiopian Tourism Commission
PO Box 2183
Addis Ababa
ETHIOPIA

Dear Commissioner,

Please refer to our letter of the 4th April - a copy of which is attached. Mr Shanka's Australian Government bursary extends for a limited time - three years. The University requires that we finalize a proposal of the program by the end of June.

In order to meet these deadlines, it is essential for Mr Shanka to commence his research as soon as possible.

I am sure you will agree that his research could well prove to be of significance to your country and we certainly believe the applied project could be academically acceptable.

We look forward to your early response.

Yours faithfully,

DR FRED FROST
Associate Professor
School of Management

4 July 1990

Comrade Dawit Getachew
Chief Commissioner
Ethiopian Tourism and
Hotels Commission
Addis Ababa
ETHIOPIA
Fax No. 251 1 517533

Dear Commissioner,

RE PH.D THESIS - MR TEKLEHAIMANOT SHANKA

Please refer to our correspondence concerning Mr Shanka's Ph.D thesis.

Despite the fact that we have sent a number of letters to both yourself and Dr Solomon Desta, we have, as yet, not received any replies. The position, in terms of timing from the University's point of view is now critical. I would like to reiterate the position.

The Australian Government has arranged for Mr Shanka to undertake a Ph.D program at Curtin University under the Australian International Development Assistance Bureau. He successfully completed an M.Bus degree under the same scheme last year.

Mr Shanka approached me to supervise his doctoral work in the tourism area. Where possible we attempt to structure such programmes on practical issues. Hence "the concept of developing an integrated strategy for service marketing in the tourism industry with specific reference to the Ethiopian context". In short, we aim to develop for your Commission a complete strategic plan.

We have requested the following:-

- (i) A letter from your office supporting our request for international funding.
- (ii) The program is, academically speaking, very demanding. The Ph.D will be by thesis. This will necessitate access to pertinent data.
- (iii) In order to provide you with this substantial research, we need access to your existing strategic planning and in depth data relating to tourism.
- (iv) It is essential that Mr Shanka works in your department to gather the necessary information.

If this start is delayed any further, it could seriously disadvantage the program - which may then have to be aborted. I am sure you would agree, this would be a wasted opportunity.

Please fax your reply at the earliest.

Yours faithfully,

Dr Fred Frost
Associate Professor
School of Management

19 July 1990

Dr Solomon Desta
Head, Tourism Promotion
Tourism and Hotels Commission
Addis Ababa
Ethiopia

Dear Dr Solomon,

RE TOURISM RESEARCH PROJECT - PRELIMINARY REQUIREMENTS

Mr Teklehaimanot Shanka will be returning to Ethiopia in November on a sponsored field research trip.

In the interim, it would be most helpful if the following information could be provided:-

- A map of Ethiopia identifying tourist attractions
- The Commission's plan of action
- Availability and types of accommodation with number of beds
- Availability of infrastructure: road, air, sea, rail (schedules etc)
- Tourist arrivals during the past ten years by countries of origin, nature of visit, length of stay and respective annual revenue
- List of travel agents inside and outside the country
- List of tour operators

Your immediate reply will be highly appreciated.

Yours faithfully,

Dr Fred Frost
Associate Professor
School of Management

25 May 1992

Mr Rezene Araya
Commissioner
Ethiopian Tourism Commission
Addis Ababa
Ethiopia

Dear Mr Araya,

Further to our telephone conversation of 15th May, I would like to reiterate the basis of our request for additional information.

The Australian Government, through the Australian International Development Assistance Bureau (AIDAB), provided an opportunity for Mr Teklehaimanot Shanka, an Ethiopian national, to study at Curtin University. Mr Shanka completed a Masters degree in Business under that scheme and is now undertaking a Doctoral program.

Taking into account the special requirements that PhD programs require, it was agreed that Mr Shanka's thesis would serve all interests, including those of the Ethiopian Government, if it could be of direct applicability to your country. As such the research topic developed was: **STUDY TO DEVELOP A STRATEGIC MODEL FOR THE ETHIOPIAN TOURISM INDUSTRY.**

We believe that the independent research (which to all interests is cost-free to your Government) would provide a basis for establishing a tourism strategy.

In order to ensure that a meaningful document is produced, we require informational inputs. To this end, Mr Shanka completed a field trip to Ethiopia in May 1991. The staff of the various departments have proven most helpful. For this our sincere thanks and we are pleased to advise you that the analysis of the data is well under way.

In the course of the analysis, it was decided that a survey be conducted here in Australia to have an insight into peoples' perception of Ethiopia as a tourist destination country. A pilot survey was conducted in September 1991 which revealed interesting information. These findings will be incorporated in the Thesis.

Moreover, we are in the process of undertaking a broader survey Australia-wide to determine the perceptions of wholesale tour operators towards Ethiopia as a tourist destination (Appendix 1).

At this stage the study requires further information from your senior staff. We have compiled a questionnaire which we would request be distributed to the persons nominated in Appendix 2.

We believe this information would provide up-to-date material from experienced management, specifically providing guidance to us through their experience and knowledge of the market.

To facilitate the posting of the questionnaires, we have enclosed reply paid envelopes and international coupons so that each respondent can directly mail to us without incurring a cost.

We will ensure that the results of the responses will be used in aggregate form and that identities of all respondents will be maintained in strict confidentiality.

We trust that the matter will be given your urgent attention.

Thanking you in advance.

Yours sincerely,

Dr Fred Frost
Associate Professor
School of Management

Appendix 1

Survey Targets in Australia

1. **Curtin University of Technology**
 - 1.1 **Academic Staff and Students**
2. **Wholesale Tour Operators**
3. **International Airlines**
4. **Travel Agencies**
5. **Individuals**

Appendix 2

This questionnaire should be filled by senior staff as follows:

1. **Ethiopian Tourism Commission Main Office**
 - 1.1 **Ethiopian Tourism Commission Main Office**
 - 1.1.1 Commissioner
 - 1.1.2 Deputy Commissioner
 - 1.1.3 Tourism Advisor
 - 1.1.4 Heads of Department
 - 1.1.5 Heads of Services
 - 1.2 **National Tour Operation and Travel Agency Corp**
 - 1.2.1 Manager
 - 1.2.2 Deputy Manager
 - 1.2.3 Heads of Departments
 - 1.2.4 Heads of Services
 - 1.3 **National Hotels Corporation**
 - 1.3.1 Manager
 - 1.3.2 Deputy Manager
 - 1.3.3 Heads of Departments
 - 1.3.4 Heads of Services
 - 1.4 **Ethiopian Tourist Trading Corporation**
 - 1.4.1 Manager
 - 1.4.2 Deputy Manager
 - 1.4.3 Heads of Departments
 - 1.4.4 Heads of Services
 - 1.5 **Catering and Tourist Trading Institute**
 - 1.5.1 Head of Institute
 - 1.5.2 Deputy Head of Institute
 - 1.5.3 Heads of Departments
- 2.0 **Members of the Tourism Council**

3 February 1993

Dr Tewodros Atlabachew
Tourism Development Department
Ethiopian Tourism Commission
Addis Ababa
Ethiopia

Dear Dr Tewodros

We are currently updating our data on tourist facilities in the country. We do not, however have data on private hotels, tour operators and travel agents who have so far registered with your Department since the introduction in 1990 of the mixed economic policy.

We would therefore appreciate it if you could complete and return at your earliest convenience the enclosed information sheet.

Thank you in advance.

Yours sincerely,

Dr Fred Frost
Associate Professor
School of Management

Tekle Shanka
Doctoral Student
School of Management

Data on Private Hotels, Tour Operators and Travel Agents

1. Hotels
 - a. Completed
 - Rooms: _____
 - Beds: _____
 - Employees: _____
 - b. Under construction
 - Rooms: _____
 - Beds: _____
 - Employees: _____
2. Tour Operators
 - Number: _____
 - Employees: _____

Distribution of Hotels, Tour Operators and Travel Agents

	<u>Addis Ababa</u>	<u>Elsewhere</u>
1. Hotels		
a. Completed		
Rooms:	_____	_____
Beds:	_____	_____
b. Under Construction		
Rooms:	_____	_____
Beds:	_____	_____
2. Tour Operators	_____	_____
3. Travel Agents	_____	_____

23 March 1993

Dr Tewodros Atlabachew
Tourism Development Department Head
Commission for Hotels and Tourism
Addis Ababa
Ethiopia

Fax: 0011 2511 517 533

Dear Dr Tewodros,

Re: Our letter dated 11 February 1993

Enclosed for your convenience is the above mentioned letter with a data sheet.

We would appreciate it if you could complete and return the information sheet at your earliest convenience.

Thanking you in advance.

Yours sincerely,

Dr Fred Frost
Associate Professor
School of Management

Tekle Shanka
Doctoral Student
School of Management

Note: For copyright reasons pp 382-3 have not been reproduced.

**(Co-ordinator, ADT Project (Retrospective), Curtin University of Technology,
14.11.02)**

6 May 1993

Mr Enzo Paci
Chief, Statistics Section
World Tourism Organization
Capitan Haya 42
28020 Madrid
Spain

Dear Mr Paci,

**Re: Proceedings and Recommendations on International Conference on
Travel and Tourism Statistics: Ottawa, Canada June 24-28, 1991**

Mr Tekle Shanka, a national of Ethiopia, is working under my supervision on a research project towards his Doctoral Degree, focusing on developing a strategy for the Ethiopian Tourism Development.

We believe that the proceedings and recommendations of the abovementioned Conference on Tourism Statistics will have significant inputs for Tekle's project.

We therefore kindly request you to provide us with copies of the proceedings and recommendations.

Awaiting in anticipation.

Yours sincerely,

Dr Fred Frost
Associate Professor
School of Management

Tekle Shanka
Doctoral Student
School of Management

10 August 1993

Dr Solomon Desta
Head, Tourism Promotion Department
Ethiopian Tourism Commission
PO Box 2183
Addis Ababa
Ethiopia

Dear Dr Solomon,

Mr Tekle Shanka's PhD is now near completion. We assume that the Tourism Commission has by now produced several promotional materials in light of changes in its marketing strategy. It would be advantageous to include any such update in our research.

We would therefore appreciate it if you could send us at your earliest convenience:

1. a copy of promotional strategy
2. promotional leaflets
3. promotional video/s (if any)
4. posters.

Your early response will highly appreciated.

Yours sincerely,

Dr Fred Frost
Associate Professor
School of Management

Tekle Shanka
Doctoral Student
School of Management

10 August 1993

Dr Tewodros Atlabachew
Head, Tourism Services Development Department
Ethiopian Tourism Commission
PO Box 2183
Addis Ababa
Ethiopia

Dear Dr Tewodros,

Thank you for sending us an inventory of tourism services being undertaken by private investors.

We would also appreciate it if you could send us at your earliest convenience:

1. a list of hotel classifications
2. emblems that depict various classes
3. guidelines for investors.

Your early response will be highly appreciated.

Yours sincerely,

Dr Fred Frost
Associate Professor
School of Management

Tekle Shanka
Doctoral Student
School of Management

22 August 1993

Mr Abebe Teferi
Head, Planning Services
Ethiopian Tourism Commission
PO Box 2183
Addis Ababa
Ethiopia

Dear Mr Abebe,

Mr Tekle Shanka's PhD thesis is now near completion. We are making a final update of the Ethiopian tourism statistics. We would therefore appreciate it if you could send us, at your earliest convenience, the latest tourist statistics. The latest we have is of August 1992.

Your early response will be highly appreciated.

Yours sincerely,

Dr Fred Frost
Associate Professor
School of Management

Tekle Shanka
Doctoral Student
School of Management

5 June 1992

Dear Participant,

As experts and practitioners in tourism, you are familiar with the strategic importance of tourism to many countries. The importance of tourism to developing countries is often crucial to their future growth.

Mr Tekle Shanka, an Ethiopian national, is working on a Ph.D program under the auspices of the Australian International Development Assistance Bureau (AIDAB) scheme. The project is concerned with developing a tourism strategy for Ethiopia.

As an adjunct component of this research, we are attempting to gauge attitudes and perceptions of Ethiopia from professionals in the industry.

We would like to ask you to fill out the questionnaire enclosed.

Your identity will be maintained in strict confidentiality. We also assure you that a summary of findings will be supplied to all respondents.

Your co-operation is highly appreciated.

Yours faithfully,

Dr Fred Frost
Associate Professor
School of Management

Tekleh Shanka
Doctoral Student

enc: reply paid envelope

ETHIOPIA: A TOURIST DESTINATION

Part I About Ethiopia

1. How do you rate your knowledge of Ethiopia in the following areas? (From "1" denoting "no knowledge" to "7" denoting "very knowledgeable")

		No Knowledge					Very Knowledgeable
1. History		1	2	3	4	5	6 7
2. Civilization		1	2	3	4	5	6 7
3. Culture		1	2	3	4	5	6 7
4. Wildlife		1	2	3	4	5	6 7
5. Scenery		1	2	3	4	5	6 7
6. Political Stability		1	2	3	4	5	6 7
7. Economic Development		1	2	3	4	5	6 7

2. What is your perception about Ethiopia in terms of the following? (Please circle which best describes your perception, from "1" "very negative" to "7" "very positive")

		Very Negative					Very Positive
1. History		1	2	3	4	5	6 7
2. Civilization		1	2	3	4	5	6 7
3. Culture		1	2	3	4	5	6 7
4. Wildlife		1	2	3	4	5	6 7
5. Scenery		1	2	3	4	5	6 7
6. Political Stability		1	2	3	4	5	6 7
7. Economic Development		1	2	3	4	5	6 7

3. What is the source of your knowledge of Ethiopia? (Please tick one)

1. Business Contacts
2. Friends
3. Media
4. Relatives
5. Promotional Materials
6. Educational Institution
7. Other (Please specify) _____

4. In your opinion, how does Ethiopia rate on the following features? (Please circle corresponding numbers which best represent your opinion, “1” “extremely poor” and “7” “extremely well”)

	Extremely Poor					Extremely Well	
1. Tourist Attractions	1	2	3	4	5	6	7
2. Cultural Diversity	1	2	3	4	5	6	7
3. Political Stability	1	2	3	4	5	6	7
4. Accommodation	1	2	3	4	5	6	7
5. History	1	2	3	4	5	6	7
6. Shopping Facilities	1	2	3	4	5	6	7
7. Events	1	2	3	4	5	6	7
8. Transportation	1	2	3	4	5	6	7
9. Food	1	2	3	4	5	6	7
10. Standard of Living	1	2	3	4	5	6	7
11. Beaches	1	2	3	4	5	6	7
12. Tourist Information	1	2	3	4	5	6	7
13. Banking Facilities	1	2	3	4	5	6	7
14. Entertainment	1	2	3	4	5	6	7
15. Visa Formalities	1	2	3	4	5	6	7
16. Customs Policies	1	2	3	4	5	6	7
17. Communications	1	2	3	4	5	6	7
18. International Airfare Costs	1	2	3	4	5	6	7

5. In your estimation, in which areas should Ethiopia make improvements in order to attract international tourists? (Please circle corresponding numbers most appropriate to your estimation, from “1” as “no improvement needed”, to “7” “significant improvement needed”)

	No Improvement Needed					Significant Improvement Needed	
1. The country's image	1	2	3	4	5	6	7
2. Political Stability	1	2	3	4	5	6	7
3. Promotional Activities	1	2	3	4	5	6	7
4. Government Policy	1	2	3	4	5	6	7
5. Accommodation	1	2	3	4	5	6	7
6. Infrastructure	1	2	3	4	5	6	7
7. International Accessibility	1	2	3	4	5	6	7
8. Banking Facilities	1	2	3	4	5	6	7
9. Institutional Changes	1	2	3	4	5	6	7
10. Immigration Formalities	1	2	3	4	5	6	7
11. Customs Regulations	1	2	3	4	5	6	7
12. International Airfares	1	2	3	4	5	6	7

6. Given a scenario in which Eritrea secedes from Ethiopia and becomes an independent country, in your opinion, will Ethiopia be able to become a tourist destination country?

1. Yes
2. No

7. Does your company currently promote Ethiopia as a tourist destination?

1. Yes
2. No

8. If your answer to Question 7 is “yes”, with which other destinations do you combine tours to Ethiopia? (Please select the most likely response corresponding to the countries listed, from “1” indicating “definitely not”, to “7” indicating “definitely will”)

		Definitely Not					Definitely Will	
		1	2	3	4	5	6	7
1.	With Kenya	1	2	3	4	5	6	7
2.	With Egypt	1	2	3	4	5	6	7
3.	With Zimbabwe	1	2	3	4	5	6	7
4.	With Tanzania	1	2	3	4	5	6	7
5.	With Uganda	1	2	3	4	5	6	7
6.	With Botswana	1	2	3	4	5	6	7
7.	With South Africa	1	2	3	4	5	6	7
8.	With Namibia	1	2	3	4	5	6	7

9. If your answer to Question 7 is “No”, could you in the future include Ethiopia in your program of travel to Africa?

1. Yes
2. No

10. If your answer to Question 7 is “No”, would it be different had Ethiopia vigorously promoted its tourism products internationally?

1. Yes
2. No

11. If you do not see Ethiopia as a tourist destination at this time what change would be necessary to you to adapt a favourable approach?

12. Has the Ethiopian Government ever provided your company with tourism promotional materials?

1. Yes
2. No

13. If "Yes" to Question 12, when did you receive the last promotional materials?
(Please specify year)

19_____

14. Do the following governments provide you with tourism promotional materials?

- | | Yes | No |
|-----------------|-----|----|
| 1. Kenya | | |
| 2. Tanzania | | |
| 3. Uganda | | |
| 4. Egypt | | |
| 5. Zimbabwe | | |
| 6. Botswana | | |
| 7. South Africa | | |
| 8. Namibia | | |

15. If the answer to Question 14 is "yes", how often do you get such materials?

- | | Monthly | Quarterly | Bi-annually | Yearly |
|-----------------|---------|-----------|-------------|--------|
| 1. Kenya | | | | |
| 2. Tanzania | | | | |
| 3. Uganda | | | | |
| 4. Egypt | | | | |
| 5. Zimbabwe | | | | |
| 6. Botswana | | | | |
| 7. South Africa | | | | |
| 8. Namibia | | | | |

16. How does Ethiopia's tourism potential compare with that of the following tourist destination countries in the region? (Please circle corresponding numbers as appropriate, "1" "extremely poor", "7" "extremely good")

		Extremely Poor					Extremely Well	
1.	Kenya	1	2	3	4	5	6	7
2.	Tanzania	1	2	3	4	5	6	7
3.	Uganda	1	2	3	4	5	6	7
4.	Egypt	1	2	3	4	5	6	7
5.	Zimbabwe	1	2	3	4	5	6	7
6.	Botswana	1	2	3	4	5	6	7
7.	South Africa	1	2	3	4	5	6	7
8.	Namibia	1	2	3	4	5	6	7

17. Which of the following Airlines serve Ethiopia (Please tick as many answers as possible)

1. Aeroflot
2. Lufthansa
3. China Airlines
4. Alitalia
5. Kenya Airways
6. Yemenia
7. Alyemda
8. Saudia
9. Air Djibouti
10. British Airways
11. Ethiopian Airlines
12. Air France
13. Sabena
14. Air India
15. Singapore Airlines
16. Qantas Airways

18. Based on your experience with other countries, what types of promotional information would you require in order to "sell" Ethiopia as a tourist destination?

Part II About the Company

19. Name of the company: _____

20. Business address: _____

21. Type of business: (Please tick one)

- 1. Wholesale Tour Operator
- 2. Airline

22. Number of employees (Please tick one)

- 1. Less than 5
- 2. 5 - 9
- 3. 10 - 14
- 4. 14 - 19
- 5. 20 and over

23. Client base (Please tick one or more as applicable)

- 1. Business Traveller
- 2. Vacationer
- 3. Holiday Maker
- 4. Other (Please specify) _____

24. In which geographic areas does your company give services? (Please tick one or more as applicable)

- 1. Australia
- 2. Pacific Rim
- 3. Middle East
- 4. Asia
- 5. Europe
- 6. Africa
- 7. Americas

25. How would you rank the following in terms of the volume of business undertaken by your company?

<u>Geographic Area</u>	<u>Rank</u>	<u>Geographic Area</u>	<u>Rank</u>
1. Australia	_____	5. Europe	_____
2. Pacific Rim	_____	6. Africa	_____
3. Middle East	_____	7. Americas	_____
4. Asia	_____		

26. From your experience, what is the average length of stay of your clients in their places of holiday? (Please tick one)

1. Less than 3 nights
2. 3 - 5 nights
3. 6 - 8 nights
4. 9 - 11 nights
5. Over 11 nights

27. How important are the following to your clients in assessing a suitable holiday destination? (Please circle as appropriate from "1" "not important at all", "7" "extremely important")

	Not Important At All						Extremely Important
1. History	1	2	3	4	5	6	7
2. Archaeology	1	2	3	4	5	6	7
3. Culture	1	2	3	4	5	6	7
4. Religion	1	2	3	4	5	6	7
5. Wildlife	1	2	3	4	5	6	7
6. Nature	1	2	3	4	5	6	7
7. Beaches	1	2	3	4	5	6	7
8. Climate	1	2	3	4	5	6	7
9. Political Stability	1	2	3	4	5	6	7
10. Economic Development	1	2	3	4	5	6	7

Part III About the Respondent

28. Name: _____

29. Contact No.: _____

30. Position in company: _____

31. Number of years worked in tourism industry: _____

THANK YOU VERY MUCH

7 July 1992

Mr Rezene Araya
Commissioner
Ethiopian Tourism Commission
PO Box 2183
Addis Ababa
Ethiopia

Dear Mr Araya,

Re: PhD Thesis "The Development of a Tourism Strategy for Ethiopia"

We recall our telephone conversation of 15 May 1992 and subsequent letter of 25 May 1992 which was sent to you along with one hundred questionnaires on 29 May 1992. The input of your staff is essential to the success of this project.

To date, as we have not received any responses, we are compelled to request for your assistance in getting the questionnaires completed and returned to us the soonest.

The research is at a most interesting point. A questionnaire has been used to obtain information from tour operators in Australia and a second questionnaire has been developed to determine the perceptions of sections of Australian society with respect to Ethiopia as a tourist destination.

We are confident the overall findings will be of significant benefit to your Commission.

Thanking you in advance.

Yours sincerely,

Dr Fred Frost
Associate Professor
School of Management

24 November 1992

Your Excellency,

As an expert and policy maker in tourism, you are familiar with the importance of tourism to many countries and to Developing Countries it is often crucial to their future growth.

Mr Tekle Shanka, an Ethiopian national, is working on a Doctoral program under the Australian International Development Assistance Bureau (AIDAB) scheme. Tekle's research is concerned with developing a tourism strategy for Ethiopia.

As an adjunct component of this research we are attempting to gauge information on various Sub-Sahara African countries' views on tourism development in their respective countries. We therefore kindly request Your Excellency's assistance in completing the enclosed short questionnaire and returning to **Dr Fred Frost, School of Management, Curtin University of Technology, GPO Box U1987, Perth 6001, Western Australia**, using the International Reply Coupons provided.

You will note that the questionnaire is in two parts. The first deals with the emphasis placed on tourism by your government. The second element is taken from **The Europa World Year Book 1992 Vol. 1 & 2** and identifies tourist attractions in Sub-Sahara African countries. We would be most obliged for your consideration of the material relevant to your country. If you feel this information is not representative of the tourist attractions, please provide us with the missing information.

Your identity will be maintained in strict confidentiality as the information you provide will be used in aggregate form. We also assure you that a summary of the findings will be supplied to all respondents.

Your Excellency's co-operation is highly appreciated.

Yours sincerely,

Dr Fred Frost
Associate Professor
School of Management

Tekle Shanka
Doctoral Student
School of Management

PART I

ID No
01-02

1. What percentage of the National Budget is allocated for the Tourism sector for the following years? (Please circle appropriate numbers) 03-07

	<1%	1-3%	4-6%	7-9%	10-12%	13-15%	>15%
1991/92	1	2	3	4	5	6	7
1990/91	1	2	3	4	5	6	7
1989/90	1	2	3	4	5	6	7
1988/89	1	2	3	4	5	6	7
1987/88	1	2	3	4	5	6	7

2. What percentage of Tourism Budget is allocated for promotional activities for the following years? (Please circle appropriate numbers) 08-12

	<1%	1-3%	4-6%	7-9%	10-12%	13-15%	>15%
1991/92	1	2	3	4	5	6	7
1990/91	1	2	3	4	5	6	7
1989/90	1	2	3	4	5	6	7
1988/89	1	2	3	4	5	6	7
1987/88	1	2	3	4	5	6	7

3. What is the percentage contribution of tourism to GDP for the following years? (Please circle appropriate numbers) 13-16

	<1%	1-3%	4-6%	7-9%	10-12%	13-15%	>15%
1991/92	1	2	3	4	5	6	7
1990/91	1	2	3	4	5	6	7
1989/90	1	2	3	4	5	6	7
1988/89	1	2	3	4	5	6	7
1987/88	1	2	3	4	5	6	7

4. Do you have Tourism Promotion Offices overseas? (Please circle one number) 17

Yes	1
No	2

5. If your answer to No.4 is a "yes" how many such offices are there? (Please circle one number) 18

One	1
Two-four	2
Five-seven	3
Eight-ten	4
More than ten	5

6. In which continent/s are these offices located? (Please circle appropriate number) 19-24
- | | |
|---------------|---|
| Africa | 1 |
| Asia | 2 |
| Europe | 3 |
| North America | 4 |
| South America | 5 |
| Australia | 6 |
7. How often do you provide promotional materials to tour wholesalers? (Please circle one number) 25
- | | |
|-------------|---|
| Monthly | 1 |
| Quarterly | 2 |
| Half yearly | 3 |
| Yearly | 4 |
| Never | 5 |
8. How significant is the participation of the private sector in tourism industry? (Please circle one number) 26
- | | |
|------------------------|---|
| Very significant | 1 |
| Significant | 2 |
| Less significant | 3 |
| Not significant at all | 4 |
9. In your opinion which of the following has the most impact on international tourists' choice of destination? (Please circle one number) 27
- | | |
|----------------------|---|
| Political stability | 1 |
| Accommodation | 2 |
| Friendly people | 3 |
| Tourist attractions | 4 |
| Price | 5 |
| Banking facilities | 6 |
| Entertainment | 7 |
| Language | 8 |
| Economic development | 9 |
10. On a scale of 10, how would you rate your country's tourism performance? (Please circle one number) 28-37
- 1 2 3 4 5 6 7 8 9 10

11. Do you have a Tourism Advisory Council? (Please circle one number) 38
- Yes 1
No 2
12. What proportion of the Tourism Budget is allocated to Staff Training? 39
(Please circle one number)
- < 1% 1
1 - 3% 2
4 - 6% 3
7 - 9% 4
> 9% 5
13. How is staff training effected? (Please circle one number) 40
- In the Ministry's training institute 1
In colleges/high schools 2
In higher educational institutions 3
In vocational schools 4
Abroad 5
14. What is the major factor you look for in selecting your staff to key 41
positions? (Please circle one number)
- Relevant training 1
Seniority (age) 2
Long service (general) 3
Long service (tourism) 4
Marketing skills 5
Political affiliations 6
Other (specify) 7

Part II

Inventory of Major Tourist Attractions of Sub-Sahara African Countries

Country	1	2	3	4	5	6	7	8	9	10	11	12	13	14
Angola														
Benin	x	x												
Botswana	x	x												
B Faso		x												
Burundi														
Cameroon	x	x	x	x										
Cape Verde				x					x					
C.A.R.		x			x	x	x	x						
Chad	x	x						x	x					
Comoros				x			x		x					
The Congo														
C D'Ivoire		x	x			x				x	x			
Djibouti									x			x		
Eq Guinea														
Ethiopia													x	
Gabon	x													
The Gambia				x										
Ghana		x	x	x										
G - Bissau														
Kenya	x	x		x										x
Lesotho									x					
Liberia														
Madagascar														
Malawi		x		x					x					x
Mali														
Mauritania														
Mauritius			x	x					x					x
Mozambique														
Namibia	x	x												
Niger		x					x							
Nigeria			x			x			x					
Reunion														
Rwanda	x								x	x				

Country	1	2	3	4	5	6	7	8	9	10	11	12	13	14
St Helena														
Sao Tome & P														
Senegal	x			x									x	
Seychelles	x								x	x				
S Leone		x		x					x					
Somalia														
S Africa		x							x					x
Sudan														
Swaziland		x							x					
Tanzania	x	x				x								
Togo														
Uganda						x		x		x				
Zaire									x	x				
Zambia								x	x					
Zimbabwe	x	x			x									

Keys

1. National Parks
2. Game Reserves
3. Culture
4. Beaches
5. Waterfalls
6. Forests
7. Fishing
8. Wild animals
9. Scenery
10. Lakes/Lagoons
11. City
12. Watersports
13. History
14. Climate

End of questionnaire

Thank you very much

11 December 1992

Dear Participant,

Having been born and lived in Ethiopia, you are probably well aware of the richness of the country's history, culture, wildlife, scenery, climate, etc that make Ethiopia a potential tourist destination.

Mr Tekle Shanka is currently working on a Doctoral Program under the auspices of the Australian International Development Assistance Bureau (AIDAB) scheme. Tekle's research focuses on developing a tourism strategy for Ethiopia.

As an adjunct component of this research, we are attempting to gauge your impartial and constructive views on Ethiopia's tourism potential in comparison with Kenya, Egypt, Zimbabwe and Australia. We therefore kindly request your co-operation in completing and returning the enclosed questionnaire in the self-addressed, reply-paid envelope.

As the responses will be used in aggregate, your identity will be maintained in strict confidentiality.

Thank you in advance.

Yours sincerely,

Dr Fred Frost
Associate Professor
School of Management

Tekle Shanka
Doctoral Student
School of Management

[P.S. Should you know of any Ethiopian living in Australia who would also like to participate in this survey, please ask him/her to contact Mr Tekle Shanka, School of Management, Curtin University, Perth on (09) 351-7292.]

PART ONE

Please answer the following questions by circling the most appropriate answer/s.

1. Have you travelled overseas?
 1. Yes
 2. No

2. Which continent/s have you visited?
 1. Africa
 2. Asia
 3. Europe
 4. North America
 5. South America
 6. All of the above
 7. None of the above

3. If you have been to Africa, which part have you visited?
 1. Northern Africa
 2. Eastern Africa
 3. Southern Africa
 4. Central Africa
 5. Western Africa
 6. All of the above
 7. None of the above

4. Have you been to Ethiopia?
 1. Yes
 2. No

5. What three most important features do you consider essential for a tourist destination?
 - 1.
 - 2.
 - 3.

6. How far back has Ethiopia's civilization been traced?
 1. Centuries before Christ
 2. 1st to 4th century A.D.
 3. 5th to 9th century A.D.
 4. 10th to 14th century A.D.
 5. 15th to 19th century A.D.
 6. 20th century
 7. Don't know

7. What is your view of Ethiopia in general?
 1. Poor
 2. Country with a long history and culture
 3. Remote
 4. Underdeveloped
 5. Famine stricken
 6. Politically unstable
 7. Country with a potential to grow
 8. War ravaged

8. On a scale of 1 to 7, how would you rank your knowledge of Ethiopia?
 1. Extremely poor
 2. Very poor
 3. Poor
 4. Fair
 5. Good
 6. Very good
 7. Extremely good

9. Based on your preferences above (#5), would you consider Ethiopia as a tourist destination?
 1. Yes
 2. No
 3. Don't know

END OF PART ONE

THANK YOU

PART TWO

Having just attended the Seminar, "Ethiopia: Land with Tremendous Tourism Potential", please answer the following questions by circling the most appropriate answer/s.

1. How would you rate your knowledge of Ethiopia?
 1. Extremely poor
 2. Very poor
 3. Poor
 4. Fair
 5. Good
 6. Very good
 7. Extremely good

2. What feature/s impressed you most?
 1. History
 2. People
 3. Landscape and scenery
 4. Wildlife
 5. Cultural activities
 6. Artifacts
 7. All of the above
 8. None of the above

3. Do you think Ethiopia will in the future be a tourist destination?
 1. Yes
 2. No
 3. Not sure
 4. Don't know

4. What areas do you think need improvements in order to attract tourists?
 1. The country's image
 2. Government policy
 3. Infrastructure
 4. Political stability
 5. Promotional activities
 6. Institutional restructuring
 7. Immigration and customs policies
 8. Banking facilities
 9. Hotels
 10. All of the above
 11. Other

5. Would you consider going to Ethiopia one day?
 1. Yes
 2. No
 3. Don't know

6. Will you pass on the knowledge you have gained about Ethiopia to others?
 1. Yes
 2. No
 3. Not sure

7. If you decide to see Ethiopia in the future, which tourist destination African country/ies will you also include in your itinerary?
 1. Kenya
 2. Tanzania
 3. Egypt
 4. Zimbabwe
 5. South Africa
 6. Botswana
 7. All of the above
 8. None of the above

END OF THE QUESTIONNAIRE

THANK YOU VERY MUCH

1. Have you travelled overseas? (Circle one number) (4)
- | | | |
|-----|---|--|
| Yes | 1 | |
| No | 2 | |
2. Which continent/s have you visited? (Circle appropriate number)
- | | | |
|---------------|---|-----|
| Africa | 1 | (5) |
| Asia | 2 | (6) |
| Europe | 3 | (7) |
| North America | 4 | (8) |
| South America | 5 | (9) |
3. If you have been to Africa, which part/s have you visited? (Circle appropriate numbers)
- | | | |
|----------|---|------|
| Northern | 1 | (10) |
| Eastern | 2 | (11) |
| Southern | 3 | (12) |
| Central | 4 | (13) |
| Western | 5 | (14) |
4. Have you been to Ethiopia? (Circle one number)
- | | | |
|-----|---|------|
| Yes | 1 | (15) |
| No | 2 | |
5. In your opinion how far back does Ethiopia's civilization go? (Circle one number)
- | | | |
|-------------------------|---|------|
| Centuries before Christ | 1 | (16) |
| 1st - 5th Century | 2 | |
| 6th - 10th Century | 3 | |
| 11th - 15th Century | 4 | |
| 16th - 20th Century | 5 | |
6. How would you rank your knowledge of Ethiopia? (Circle one number)
- | | | |
|----------------|---|------|
| Extremely poor | 1 | (17) |
| Very poor | 2 | |
| Poor | 3 | |
| Fair | 4 | |
| Good | 5 | |
| Very good | 6 | |
| Extremely good | 7 | |

7. Which of the following do you believe provides the best general description of Ethiopia? (Circle one number)

Poor	1	(18)
Country with a long history	2	
Politically unstable	3	
War ravaged	4	
With potential to grow	5	
Rich in culture	6	
Famine stricken	7	
A good tourist destination	8	

8. What three most important features do you consider essential for a tourist destination?

1. _____	(19-20)
2. _____	(21-22)
3. _____	(23-24)

9. Based on your opinion above (#8), could you consider Ethiopia as a tourist destination? (Circle one number)

Yes	1	(25)
No	2	
Don't know	3	

END OF PART ONE

THANK YOU

1. How would you rate your knowledge of Ethiopia? (Circle one number)

Extremely poor	1	(26)
Very poor	2	
Poor	3	
Fair	4	
Good	5	
Very good	6	
Extremely good	7	

2. What feature/s impressed you most? (Circle appropriate number)

History	1	(27)
People	2	(28)
Landscape and scenery	3	(29)
Wildlife	4	(30)
Cultural activities	5	(31)
Artifacts	6	(32)
Infrastructure	7	(33)
None of the above	8	(34)

3. In your opinion which area needs improvement? (Circle appropriate number)

The country's image	1	(35)
Government policy	2	(36)
Infrastructure	3	(37)
Political stability	4	(38)
Promotional activities	5	(39)
Institutional setup	6	(40)
Customs and visa	7	(41)
Banking facilities	8	(42)
Accommodation	9	(43)

4. How would you rate Ethiopia as a tourist destination in a seven point scale? (Circle one number)

Definitely No						Definitely Yes	
1	2	3	4	5	6	7	(44)

5. Would you consider Ethiopia as a tourist destination? (Circle one number)

Yes	1	(45)
No	2	
Don't know	3	

6. If you at a later date consider visiting Ethiopia, which other tourist destination would you include in your itinerary? (Circle appropriate number)

Kenya	1	(46)
Tanzania	2	(47)
Egypt	3	(48)
Zimbabwe	4	(49)
South Africa	5	(50)
Botswana	6	(51)

7. Would you be able to pass the knowledge you have gained of Ethiopia to others? (Circle one number)

Yes	1	(52)
No	2	
Don't know	3	

8. What age group are you? (Circle one number)

20 years or under	1	(53)
21 - 30	2	
31 - 40	3	
41 - 50	4	
51 - 60	5	
61 years or over	6	

9. What is your sex?

Male	1	(54)
Female	2	

10. What is your occupation? _____ (55-56)

11. Which income category are you in? (Circle one number)

\$20,000 or less	1	(57)
\$20,001 - 30,000	2	
\$30,001 - 40,000	3	
\$40,001 - 50,000	4	
\$50,001 - 60,000	5	
\$60,001 - 70,000	6	
\$70,001 or over	7	

END OF PART TWO
THANK YOU VERY MUCH

Please indicate your PERCEPTION ABOUT ETHIOPIA AS A TOURIST DESTINATION on a seven-point scale from 1 (as “extremely negative”) to 7 (as “extremely positive”).

ID (1-3)
(Office Use Only)

1. Suitable tourist accommodation (Circle one number)
1 2 3 4 5 6 7 (4)
2. Friendliness towards visitors (Circle one number)
1 2 3 4 5 6 7 (5)
3. Guided tours (Circle one number)
1 2 3 4 5 6 7 (6)
4. Beaches (Circle one number)
1 2 3 4 5 6 7 (7)
5. Wildlife viewing (Circle one number)
1 2 3 4 5 6 7 (8)
6. General tourist attractions (Circle one number)
1 2 3 4 5 6 7 (9)
7. Recreational facilities (Circle one number)
1 2 3 4 5 6 7 (10)
8. Shopping facilities (Circle one number)
1 2 3 4 5 6 7 (11)
9. Climate (Circle one number)
1 2 3 4 5 6 7 (12)
10. Cleanliness (Circle one number)
1 2 3 4 5 6 7 (13)
11. Relative cost of air-fare to destination (Circle one number)
1 2 3 4 5 6 7 (14)

22. What is your occupation?

(25-26)

23. Which income group are you in? (Circle one number)

\$20,000 or less	1	(27)
\$20,001 - 30,000	2	
\$30,001 - 40,000	3	
\$40,001 - 50,000	4	
\$50,001 - 60,000	5	
\$60,001 - 70,000	6	
\$70,001 or over	7	

24. Which age group are you? (Circle one number)

20 years or under	1	(28)
21 - 30	2	
31 - 40	3	
41 - 50	4	
51 - 60	5	
61 years or over	6	

25. In which part of Australia do you live? (Circle one number)

New South Wales	1	(29)
Queensland	2	
Western Australia	3	
South Australia	4	
Tasmania	5	
ACT	6	
Northern Territory	7	

26. What is your gender?

Male	1	(30)
Female	2	

END OF QUESTIONNAIRE

17 July 1990

Mr Stanley Schneider
Chairman, Interwest Limited
141-464 St Kilda Road
Melbourne VIC 3004

Dear Sir,

Mr T Shanka is a Ph.D student from Ethiopia working at Curtin University under the auspicious of the Australian International Development Assistance Bureau. His topic is:

"The development of an integrated strategy for services marketing in the tourism industry with specific reference to the Ethiopian context."

Mr Shanka will be attending the conference "Tourism 1990" at which you will be delivering an address. We would very much welcome an opportunity for Mr Shanka to meet with you and your staff at or after the conference. It is important that he gain access to key decision makers - the interaction will, I am sure, prove invaluable.

Your kind co-operation is very much appreciated.

Yours faithfully,

Dr Fred Frost
Associate Professor
School of Management

ps As I will be out of the country, please address all correspondence directly to Mr Shanka C/- the School of Management.

APPENDIX B

LIST OF OFFICIALS CONTACTED

List of Officials Contacted in Ethiopia

Name	Address
Abamilke, Mr	Ministry of Labor & Social Affairs
Abebe, Dr	Ministry of Foreign Trade
Gezashign Alemie, Miss	National Tour Operation & Travel Agency Organisation
Eshetu Alemu, Mr	Ministry of Transport & Communication
Gizachew Alemu, Mr	Office of the National Committee for Central Planning
Wondwossen Alemu, Mr	Ministry of Foreign Affairs
Amerga, Mr	National Bank of Ethiopia
Rezene Araya, Mr	Ethiopian Tourist Trading Corporation, ETC
Berhane Asfaw, Dr	National Museum
Melese Asfaw, Mr	Filwoha Hotels Administration
Tidenekialesh Asfaw, Mrs	Office of Foreign Economic Relations
Makonnen Astatke, Mr	Ethiopian Air Lines
Dereje Awoke, Mr	Ministry of Finance
Maruye Ayalew, Mr	Ministry of Foreign Trade
Balcha, Mr	Civil Aviation Authority
Urgessa Bedada, Mr	Ministry of Labor & Social Affairs
Otto F Benz, Mr	Lufthansa Airlines
Berhanu, Mr	Wildlife Conservation Organisation
Lulu Berhanu, Mr	Ethiopian Transport Construction Authority
Issa Beshir, Mr	Ethiopian Air Lines
Gebbru Beyene, Mr	Hilton International
Boidin, Mr	European Commission
Jean-Claude Boidin, Mr	Commission of the European Communities (EEC) Delegation to Ethiopia
Daniel, Mr	Wildlife Conservation Organisation
Gashaw Debebe, Mr	Ministry of Foreign Trade
Demissie, Mr	Immigration
Solomon Desta, Dr	Ethiopian Tourism Commission
M F Dhliwayo, Dr	United Nations Economic Commission for Africa
Elleni, Mrs	Ethiopian Air Lines
Alipuy, Eng	Organization of African Unity
Fantu, Mr	National Hotels Corporation
Fasil, Mr	Wildlife Conservation Organisation
Fesseha, Mr	Office of the National Committee for Central Planning

List of Officials Contacted in Ethiopia

Name	Address
Fekade Selassie Fikre, Mr	Wildlife Conservation Organisation
Tadesse Gebremichael, Mr	Hilton International
Gebregiorgis Gebremariam, Mr	National Bank of Ethiopia
Getachew Gebrewold, Mr	Ethiopian Tourist Trading Corporation,
Getachew, Mr	etc
Dawit Getachew, Mr	Ethiopian Tourism Commission
Getahun, Mr	Office of the National Committee for Central Planning
Girma, Mr	Ethiopian Tourism Commission
Dagnam Yelew Girma, Mr	Ministry of Foreign Trade
Berhane Haile, Mr (Stat)	Ethiopian Tourism Commission
Mengistu Hailemariam, Mr	Office of Foreign Economic Relations
Kassahun, Mr	Ethiopian Telecommunications Authority
Kassahun, Mr	Roads Transport Authority
Kebedech, Mrs	Ethiopian Chamber of Commerce
Fekade Kersima, Mr	National Hotels Corporation
Makonnen, Mr	Office of the National Committee for Central Planning
Berhanu Makonnen, Mr	Ethiopian Orthodox Church
Yilma Makonnen, Mr	Ministry of Foreign Trade
Yeshewaalem Manne, Mr	National Bank of Ethiopia
Mathewos, Mr	Catering and Tourist Training Institute, ETC
Mesfin, Mr	Hilton International
Moges, Mr	Office of Foreign Economic Relations
Legese Motta, Mr	National Bank of Ethiopia
Jatany Mudda, Mr	Ethiopian Air Lines
Mulugeta, Mr	Ethiopian Chambers of Commerce
Negga, Mr	Civil Aviation Authority
Gosaye W Rufael, Dr	National Hotels Corporation
Samrawit, Miss	National Tour Operations Travel Agency Organisation
Sandhawalia, P S, Mr	Civil Aviation Authority
Hussein Seid, Mr	National Bank of Ethiopia
Shiferaw, Mr	Ministry of Foreign Trade
Linda Sturduk, Ms	United Nations Development Program
Lemma Tadesse, Mr	Ministry of Labor & Social Affairs
Martha Tadesse, Mrs	National Tour Operation and Travel Agency Organisation
Tezerra Tadesse, Mr	Ethiopian Hotels Administration

List of Officials Contacted in Ethiopia

Name	Address
Thanos Tagaris, Mr	Hilton International
Abdel-Rahman M Tahir, Mr	United Nations Economic Commission for Africa
Abebe Teferi, Mr	Ethiopian Tourism Commission
Debebe Tegegne, Mr	UNESCO
Tadesse Terfa, Mr	Ministry of Culture

List of Officials Contacted in Ethiopia

Name	Address
Tesfaye, Mr	Wildlife Conservation Organisation
Tigist, Miss	Wildlife Conservation Organisation
Getachew Tilahun, Mr	Office of Investment and Joint Ventures
Wariyo, Mr	Catering and Tourist Training Institute, ETC
Shiferaw Woldemicael, Mr	Office of Foreign Economic Relations
Yigzaw, Mr	National Museum
Yohannes, Mr	Customs Administration
Bahru Zergaw, Mr	Ethiopian Telecommunications Authority
Damte Zegeye, Mr	Ethiopian Tourism Commission
Asegid Zeleke, Mr	Ministry of Culture

List of Officials Contacted in Australia

Name	Address
Sayed Aliye, Mr	Oromo Community Association in Australia
Aberra Asnake, Mr	Ethiopian Community Association in Victoria
Karen Bannister, Ms	ANZ Travel, Perth
Stephen Cameron, Mr	African Wildlife Safaris, Melbourne, Vic
Bruce Copland, Mr	Quality Pacific Corporation Ltd
Girma Fesseha, Mr	Ethiopian Association in Sydney
Catriona Fraser, Ms	Australian Tourism Commission
Lindsay Ginbey, Mr	Australia Post
Alf Hoop, Mr	Department of the Arts, Sport, the Environment, Tourism & Territories
Margaret Hudson, Ms	Ministry for the Arts, Tourism and Territories
Abdul Kadir Ibrahim, Mr	Hararian Community Association in Australia
Mohammed Kasmala, Dr	Eritrean Community in Australia
Rex Linto, Mr	Qantas Airways Limited, Perth
Mary Pietrucha, Ms	Librarian, Western Australian Tourism Commission
Rodger Robertson, Mr	Qantas Airways Limited
Garry Rothwell, Mr	Project Finance Indosuez Ltd
Stanley Schneider, Mr	Interwest Limited, Melbourne, Vic
Anthony K South, Mr	NSW Tourism Commission
Mark Sparrow, Mr	Western Australian Tourism Commission
Ray Spurr, Mr	Department of the Arts, Sport, the Environment, Tourism & Territories
Gelaye Tadesse, Mr	Rescue Ethiopia, Adelaide

APPENDIX C

LIST OF OFFICIALS INTERVIEWED IN ETHIOPIA

List of Officials Interviewed in Ethiopia

Name	Address
Mulu Asnake, Mr	Catering & Tourist Training Institute
Tewodros Atlabachew, Dr	Ethiopian Tourism Commission
Asrat Bekele, Mr	Bekele Molla Hotels Pvt Ltd
Fekerte Bekele, Mrs	Ethiopian Tourism Commission
Girma Bekele, Mr	Ethiopian Tourism Commission
Paulos Bekele, Mr	National Hotels Corporation
Benz, Mr	Lufthansa (German) Airline
Yohannes Berhanu, Mr	National Tour Operation and Travel Agency Organisation
Zewde Biratu, Mr	Ethiopian Tourism Commission
Solomon Gebrekal, Mr	National Museum
Berhane Haile, Mr	Ethiopian Tourism Commission
Benny Igwebe, Mr	Organisation of African Unity
Hailu Kebede, Mr	Addis Ababa Administrative Region
Filiping Sako, Mr	United Nations Economic Commission for Africa

APPENDIX D

LIST OF ORGANIZATIONS CONTACTED

**List of Tour Wholesalers, Air Lines and Travel Agents in
Australia which Responded to Questionnaire Surveys**

Name	Address
Adventure World Travel	Perth
Aegean Tours	Sydney
African Game Trails	Dalkeith, WA
African Wildlife Safaris Pty Ltd	South Melbourne
Air Lanka Ltd	Sydney
APP International Travel	Bondi Junction, NSW
Asia Travel	Melbourne
Bentours International	Melbourne
Bonus Holidays	Bondi Junction, NSW
British Airways	Sydney
CARAS Tours	Sydney
China Tours and Travel	Perth
China Travel Service	Sydney
Club Med	Sydney
Concorde Holidays	Sydney
Cruise & Coach Corporation	Sydney
Daniel Travel Pty Ltd	Sydney
Eastern Europe Travel Bureau	Sydney
French & International Travel	Sydney
Fulton Travel	Sydney
Golden Age Holidays	Sydney
Gulf Air	Sydney
Gullivers Sport Travel	Sydney
House of Holidays Pty Ltd	Clayton, Vic
JCT/Jaltour	Sydney
Kompas Grecian Holidays	Sydney
Kuoni Travels	Sydney
Magic Carpet Tours & Travel	Perth
Merizzi Travel	Perth
Murray Travel Co	Sydney
Nippon Ryoko Australia Pty Ltd	Sydney
Pacific Island Travel Center	Sydney
Panorama Tours	Sydney
Peregrine Adventures	Melbourne
Prima Holidays Ltd	Melbourne
Qantas Jetabout Holidays	Perth
Silver Fern Holidays	Sydney
Singapore Airlines	Sydney
Summit Travel	Perth
Sundowners Adventure Travel	Surrey Hills
Sundowners Adventure Travel	West Perth

Name	Address
Sydney International Travel	Sydney
Thai Airways International Ltd	Sydney
Travel & Tour Corporation of Australia	Melbourne
Travellers	Sydney
UTA/Europe Air France	Sydney
VIP International Travel Pty Ltd	Sydney
Viva Holidays	Perth
Walkabout Travel	Perth
West Travel	Perth
Wildlife Safaris	Perth
World Expeditions	Sydney
Ya'lla Tours	St Kilda, Vic
ZTB/Travel Africa	North Sydney

List of International Airlines Contacted

(Those which had/have/intend to have regular scheduled flights to and from Ethiopia)

Airline	National Carrier of:
Air France	France
Air India	India
Air Tanzania	Republic of Tanzania
Alitalia	Italy
Alyemda	North Yemen (former)
British Airways	United Kingdom
China Airways	Peoples Republic of China
Kenya Airways	Kenya
KLM	The Netherlands
Lufthansa	Germany
Nigeria Airways	Nigeria
Sabena	Belgium
SAS	Scandinavian Countries
Saudia	Saudi Arabia
Yemenia	South Yemen (former)

APPENDIX E

LIST OF INTERNATIONAL ORGANIZATIONS CONTACTED

List of International Organisations Contacted

Organisation	Address
African Cultural Institute (ICA)	Dakar, Senegal
Australian Permanent Delegation to UNESCO	Paris, France
Ecumenical Coalition on Third World Tourism	Bangkok, Thailand
International Academy of Tourism	Monte Carlo, Monaco
International Association for Social Tourism and Workers' Leisure	Prague, Czechoslovakia
International Association for World Tourism	Brussels, Belgium
International Association of Scientific Experts in Tourism	St Gallen, Switzerland
International Bureau of Social Tourism	Brussels, Belgium
International Development Association	Washington D.C., USA
United Nations Children's Fund (UNICEF)	New York, USA
United Nations Development Program	New York, USA
United Nations Educational, Scientific and Cultural Organization (UNESCO)	Paris, France
United Nations Industrial Development Organisation (UNIDO)	Vienna, Austria
United Nations Office of the Disaster Relief Co-ordinator	Geneva, Switzerland
World Food Program (WFO)	Rome, Italy
World Tourism Organisation (WTO)	Madrid, Spain

APPENDIX F

**LIST OF SUB-SAHARAN AFRICAN COUNTRIES
INCLUDED IN THE SURVEY**

List of Sub-Saharan African Countries Included in the Survey

Country	Region
Angola	Southern
Benin	Western
Botswana	Southern
Burkina Faso	Western
Burundi	Eastern
Cameroon	Central
Cape Verde	Western
Central African Republic	Central
Chad	Central
Comoros	Indian Ocean
Congo	Central
Cote d'Ivoire	Western
Djibouti	Eastern
Equatorial Guinea	Central
Ethiopia	Eastern
Gabon	Central
The Gambia	Western
Ghana	Western
Guinea	Western
Guinea - Bissau	Western
Kenya	Eastern
Liberia	Western
Madagascar	Indian Ocean
Malawi	Southern
Mali	Western
Mauritania	Western
Mauritius	Indian Ocean
Mozambique	Southern
Namibia	Southern
Niger	Western
Nigeria	Western
Reunion	Indian Ocean
Rwanda	Eastern
Sao Tome and Principe	Western
Senegal	Western
Seychelles	Indian Ocean
Sierra Leone	Western
Somalia	Eastern
South Africa	Southern
Sudan	Eastern
Tanzania	Eastern
Togo	Western
Uganda	Eastern
Zaire	Central
Zambia	Southern
Zimbabwe	Southern

APPENDIX G

**EXCERPTS OF PERSONAL
INTERVIEWS IN ETHIOPIA**

Note: In order to protect the privacy of those interviewed, pp 433-495 have not been reproduced.

(Co-ordinator, ADT Project (Retrospective), Curtin University of Technology, 14.11.02)

APPENDIX H

**GENERAL COMMENTS RECEIVED FROM
SURVEY PARTICIPANTS**

General Comments Received From Survey Participants

All one hears about Ethiopia is internal wars, strife, and poverty, failed coups, no water etc.

Have no interest whatsoever.

Due to the political situation in Ethiopia and adjoining countries, and the poverty & misery that this has caused (& in some cases is still causing), these factors would not make this area of Africa an attractive one for the general tourist. This is despite the many areas of significant interest & beauty present. A great pity.

I feel embarrassed at submitting such a negative reply, but realize you cannot assess the situation correctly unless you receive truthful data. Clearly I know little about Ethiopia so the answers had to reflect this. However, if I had ever intended to visit your country I would have made suitable enquiries first (Tourist Bureau - friends etc). Thus my knowledge would be more relevant and no doubt many, if not all the questions, would receive far more positive answers.

I don't know anything much about Ethiopia so have answered 4 to most questions - indicating neutrality.

What does the average person know about Ethiopia? It is not on a tourist map, I collected a gun shot patient from Asmera took him to Cairo, that's all I know about the country. Therefore how can I make a judgment - but - I can give a perception. Give me a questionnaire on Algeria - Tunisia - Morocco.

I do not have a very good knowledge of Ethiopia. What I know is limited to just a few television programs that I have seen. Therefore, my responses to the questionnaire are based on that information.

Can't handle seeing the poverty that Western nations are responsible for!! Plus consider a visit too dangerous.

I am sorry, but I am unable to answer any of these questions in an informed way as I have absolutely no knowledge of Ethiopia, except of the social problems and political issues through my involvement in human rights and aid organizations in Australia.

My answers are all generally negative, being based upon ignorance rather than experience. Until I received this questionnaire, I had never shared a minute's thought to Ethiopia as a tourist destination. It would be delightful to discover my impressions are ill-founded and inaccurate.

I have never visited Ethiopia, however, I did think once of visiting it whilst passing through Africa . . . these answers are the result of a small amount of research and experience from that time. Is it Ethiopia that has the Coptic Christian Church? as the Official Religion?

My answers are quite negative as I somehow don't envisage Ethiopia as a tourist destination and with the famine and poverty and total disregard for human life in the nearby countries I am amazed at this study.

In reading your questionnaire I have to say the only information I have about Ethiopia relates to the tragedy & internal conflict, the poverty & mass malnutrition & starvation that is regularly portrayed. I would be concerned that a visit there would place a burden on scarce resources, & consider it would be an unpredictable place to visit. I have never thought of it as a tourist destination. I have thought of it as a country we must assist in as many ways as possible.

When I read your covering letter, my reaction was "you've got to be joking! Ethiopia as a holiday destination!" Perhaps that is an expected reaction as all we see on TV about Ethiopia is pictures of starving people and armed irregulars. Yet your country has a proud history and great potential.

I admit to limited knowledge of your country & get poor impressions from media reports of famine and political instability in N. Africa in general. However, I hope my response will be of assistance to you.

I equate Ethiopia with poverty, drought, and an exploding population which is likely to double in about 30 years.

I have not completed Questions 1 - 18 as I realize how little I know about Ethiopia - except from media coverages which would lead me to believe it was not a tourist destination. I am convinced with the exploitation of countries, often in financial need, at the expenses of peoples their culture, where the income generated from tourism may not assist much/healthy way over long term - my opinions only.

Difficult to do justice to this questionnaire because mostly I had no perception of the Ethiopian Tourist Industry & really of Ethiopia at all. I would have liked a "Don't know" section in your rating scale. 4 I took as neither -ve or +ve.

My visit to Ethiopia was quite a while ago 1960 to be exact so I am sure much has changed. I wish you well in your studies.

Abyssinia, Haile Selassie, Queen of Sheba, West Africa = All I know of Ethiopia. Would love to know more.

Appalled that civil war rages in a country with such widespread poverty. Both warring factions are an international disgrace and an obscenity to humanity.

From what I have seen on T.V., I would never have thought of visiting Ethiopia.

I wouldn't have a clue. I'm only guessing. You'd better get an Ethiopian Paul Hogan to do some advertising.

I have not seen any brochures or pamphlets about visiting Ethiopia. Public relations seem minimal. Priority to Somalia does not help at the moment.

I could not do justice to this questionnaire; as there is no promotion of Ethiopia as a tourist resort.

Pleased to complete the form for you. Visited Ethiopia in 1966 & very much enjoyed my brief stay travelling to Gondar from Addis by bus.

Many of the above observations are from perceptions only. Despite having been born in South Africa and having travelled and lived throughout Southern Africa, I know very little about Ethiopia.

I would be interested in the outcome of your study. Generally speaking I imagine most (including myself) know little of Ethiopia except through the famine and poor political climate.

APPENDIX I

**PROCEEDINGS OF A PAPER PRESENTED
TO THE 1992
WESTERN AUSTRALIAN INTERVARSITY SYMPOSIUM**

Note: For copyright reasons, the following paper (pp501-514 of the thesis) has not been reproduced in full:

Shanka, Tekle (1992) Tour operators perception about Ethiopia as a tourist destination. Barebone Proceedings.

(Co-ordinator, ADT Project (Retrospective), Curtin University of Technology, 14.11.02)

APPENDIX J

**PROCEEDINGS OF PAPERS PRESENTED
TO THE 1994 INTERNATIONAL CONFERENCE
ON ETHIOPIAN STUDIES**

Note: For copyright reasons, the following papers (pp516-542 of the thesis) have not been reproduced in full:

Frost, Frederick A. & Teklehaimanot Shanka Key success factors in tourism strategy: a study of Ethiopia's African competitors. Papers of the 12th International Conference of Ethiopian Studies, *New Trends in Ethiopian Studies*.

Shanka, Teklehaimanot & Frederick A. Frost Australian perceptions of Ethiopia as a tourist destination: an empirical study. Papers of the 12th International Conference of Ethiopian Studies, *New Trends in Ethiopian Studies*.

(Co-ordinator, ADT Project (Retrospective), Curtin University of Technology, 14.11.02)

APPENDIX K
CONFERENCES ATTENDED

TOURISM IN THE 1990's
6th and 7th August 1990
Hilton International Hotel
Sydney
Australia

WESTERN AUSTRALIAN INTERVARSITY 1992 BAREBONES SYMPOSIUM
2 - 3 October 1992
Curtin University of Technology
Perth
Australia

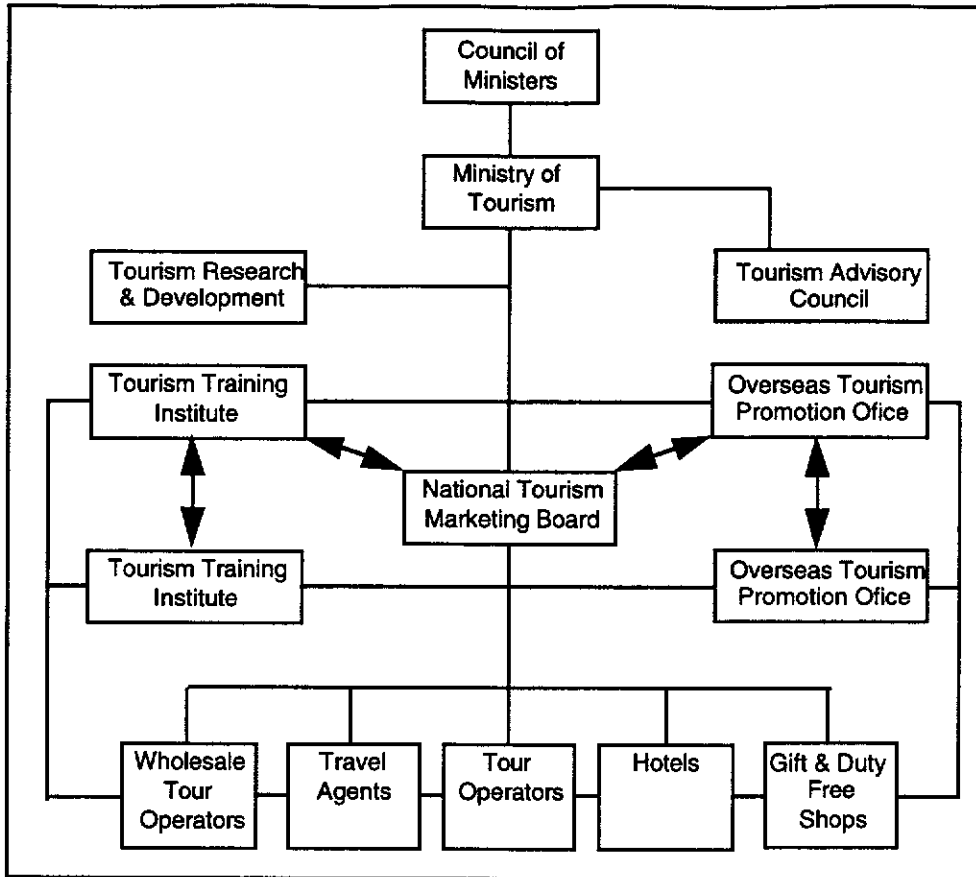
TOURISM AND HOSPITALITY RESEARCH: AUSTRALIAN AND
INTERNATIONAL PERSPECTIVES
6 - 9 February 1996
Novotel Coffs Harbour Resort
Coffs Harbour
Australia

ASSOCIATION FOR CONSUMER RESEARCH CONFERENCE
10 - 13 July 1996
Edith Cowan University
Joondalup Campus
Perth, Western Australia

APPENDIX L

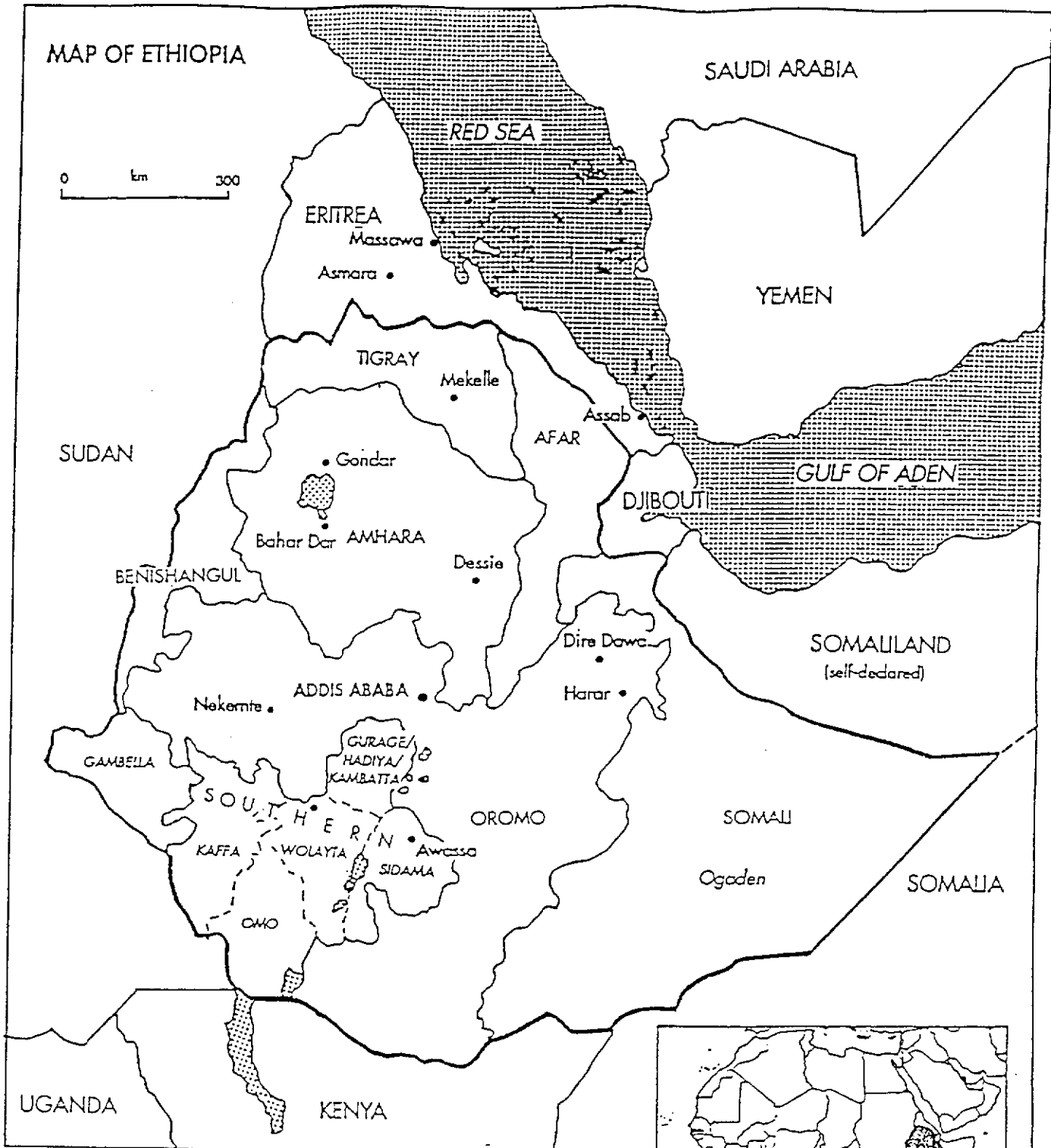
**PROPOSED ORGANIZATION CHART
FOR THE
ETHIOPIAN TOURISM COMMISSION**

**SUGGESTED ORGANIZATION CHART OF THE
ETHIOPIAN TOURISM COMMISSION**



APPENDIX M

**ADMINISTRATIVE DIVISIONS OF ETHIOPIA -
PRESENT**



APPENDIX N

ETHIOPIA: AN ADVENTURE (VIDEOTAPE)