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Ethiopian Tourism Policy

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Challenges and Prospectus of Ethiopian Tourism Industry

By Tekabe Sintayehu

Jimma University

Abstract- This study focuses on identifying the challenges and prospects of Ethiopian tourism industry. The primary data was collected from 501 foreign tourists in the study area. The result of the study show that lack of promotion, lack of physical infrastructure (road, transportation system, network facility, availability of hotel accommodations especially tourist site), misperceptions the images of Ethiopia, shortage of human trained power are challenges of Ethiopian tourism industry. On the other side the Ethiopia is a capital city of Africa because the African union located in Ethiopia, Ethiopian airline the almost the leading airline from Africa and to be a member of a star alliance, Ethiopia now building the leading African man made dam, lastly Ethiopia is one the leading African country that registered heritage by UNISCO. All this are opportunities of the growth of Ethiopian tourism industry.

Keywords: *physical infrastructure, human trained power, poor images of ethiopia.*

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Challenges and Prospectus of Ethiopian Tourism Industry

Tekabe Sintayehu

Abstract- This study focuses on identifying the challenges and prospects of Ethiopian tourism industry. The primary data was collected from 501 foreign tourists in the study area. The result of the study show that lack of promotion, lack of physical infrastructure (road, transportation system, network facility, availability of hotel accommodations especially tourist site), misperceptions the images of Ethiopia, shortage of human trained power are challenges of Ethiopian tourism industry. On the other side the Ethiopia is a capital city of Africa because the African union located in Ethiopia, Ethiopian airline the almost the leading airline from Africa and to be a member of a star alliance, Ethiopia now building the leading African man made dam, lastly Ethiopia is one the leading African country that registered heritage by UNESCO. All this are opportunities of the growth of Ethiopian tourism industry.

Keywords: physical infrastructure, human trained power, poor images of ethiopia.

1. INTRODUCTION

Tourism is one of the largest and rapidly growing industries in the world. According to the latest World Tourism Organization (UNWTO, 2014) world tourism barometer there were *international tourists arrivals grew by 5% in 2013, reaching a record 1,087 million arrivals. Despite global economic challenges, international tourism results were well above expectations, with an additional 52 million international tourists travelling the world in 2013. For 2014, UNWTO forecasts 4% to 4.5% growth - again, above the long term projections.*

Demand for international tourism was strongest for destinations in Asia and the Pacific (+6%), Africa (+6%) and Europe (+5%). The leading sub-regions were South-East Asia (+10%), Central and Eastern Europe (+7%), Southern and Mediterranean Europe (+6%) and North Africa (+6%).

"2013 was an excellent year for international tourism" said UNWTO Secretary-General, Taleb Rifai "The tourism sector has shown a remarkable capacity to adjust to the changing market conditions, fuelling growth and job creation around the world, despite the lingering economic and geopolitical challenges. Indeed, tourism has been among the few sectors generating positive news for many economies", he added.

UNWTO forecasts international arrivals to increase by 4% to 4.5% in 2014, again above its long-term forecast of +3.8% per year between 2010 and

2020. The UNWTO Confidence Index, based on the feedback from over 300 experts worldwide, confirms this outlook with prospects for 2014 higher than in previous years.

"The positive results of 2013, and the expected global economic improvement in 2014, set the scene for another positive year for international tourism. Against this backdrop, UNWTO calls upon national governments to increasingly set up national strategies that support the sector and to deliver on their commitment to fair and sustainable growth", added Mr. Rifai.

2014 regional prospects are strongest for Asia and the Pacific (+5% to +6%) and Africa (+4% to +6%), followed by Europe and the Americas (both +3% to +4%). In the Middle East (0% to +5%) prospects are positive yet volatile.

Though noted for its tourism potential, Africa's underdeveloped tourism sector is attracting only little number of the total tourist arrivals in the world. What makes the problem?

Severe is the fact that a considerable proportion of this number is taken by South Africa and Northern African countries.

As a service sector, tourism services are playing special importance's in boosting up the image of a nation and also in facilitating the economic growth and development of a nation (Mckercher, R, 1995). On the top of this issue, in fastest growing countries like Ethiopia, where the tourism sector is at its early stage and tourism tour operators are not plenty to meet the demand of their customers, it has become mandatory for government of a nation is to pay special attention for such sector -including thorough and periodic analysis over the trends in the growth of this sector, supplying this sector with the required skilled man power, furnishing this sector with the required infrastructure, and allocating financial resources, and also setting and practicing policies on how to deliver services in the tourism sector. (Nabil dabour, 2003). As indicated in the stock of literatures, though the tourism sector is one of the sectors contributing a lot towards the growth of the per capital income and cash inflow of a nation, provision of tourism services in Ethiopia is facing many constraints, and hence its trends become unattractive for those who want to run and offer tourism services to the local community and foreigners as well. For instance the official website of the Ethiopian Cculture and tourism Mminister provided the statics on the tourism service

tour operators to various group of tourists' ratio in Ethiopia to be low, thereby indicating the fact that much has to be done in the Ethiopian tourism sector. The official website of the Ethiopian culture and tourism minister there exist one state owned organization, and currently there are privately owned organizations which are delivering services in the Ethiopian tourism sector.

As it is known, the slogan of directives to be set by the government is to supervise, consult and regulate the tourism market, thereby boosting up trends in the growth of tourism services and ensuring the realization of the national economic growth and development policy set by the existing government. As cited by World Bank (2006), ups and downs in licensing of tourism service operators, inconsistent and weak supervision of such organizations by the government, little awareness as to the benefits of tourism services by the local communities, shortages of reservation software indicating tourism sites to visitors and number of registered local and foreign visitors, who got the services and image of the nation by itself are among some of the key factors that not only determine the growth and trends of the tourism sector in Ethiopia but also make the tourism sector to be at its early stage, thereby further limiting the demand of local and foreign tourists towards the Ethiopian tourism sector. One reason why the study about tourism services is important is that the government cannot ensure consistent economic growth and development only from the manufacturing sector. Another reason is that currently, the government is pursuing free economic system thereby allowing local privately owned organizations to take part in the delivery of tourism services in the Ethiopian tourism industry. The third reason is that provision of tourism services be it directly or indirectly are expected to contribute a lot towards the increment in the gross national product, economic growth, economic development and other policies, or objectives set by the government. The last reason is that, delivery of tourism services has its own contribution in building and sustaining the good image of a nation.

Now a day, Tourism sector is getting attention by developing countries since it is becoming a backup for their economy stability with the fact that their economic background mainly depends on exporting Agricultural products which has little contribution for earning hard currency (Usman A. Raheem, 2008).

Ethiopia's great potential for tourism development is mentioned everywhere and I do not go in to the details in this study. (See for example World Bank, 2006; www.tourismethiopia.org, www.ethiopia.com, various travel books and websites of tour operators). It suffices to say that it has almost all types of primary tourist products: historical attractions, national parks with endemic wild life and cultural and religious festivals. UNESCO recognizes nine world heritage sites (as many as Morocco, and South Africa and more than any other

country in Africa): Axum's obelisks, the monolithic churches of Lalibela, Gondar's castles, the Omo Valley, awash valley, konso Cultural Land scape, Tia's carved standing Stones, Semien National, Park, and the walled city of Harar.

Ethiopia to the contrary of others four African countries (Egypt, South Africa, Kenya and Tanzania), is not strong enough to attract foreign tourist tourism market. However, as these all countries possess their own tourism supplies, Ethiopia also has its own supplies and yet the flow of international tourists to Ethiopia is very little. This claim comes out from the figure of WTO international tourist's statistics that is registered with in Ethiopian tourists' arrival for the last fifteen years. For example when it sees our neighbour countries Kenya are three times greater tourist arrival and gets 11.9% GDP contribution (Source: World Travel and Tourism Council Data, 2013). While in Ethiopia the tourist contribution for the GDP are 4.8% only. (Source: World Travel and Tourism Council Data, 2013). Thus, the concern of this study is to question why this situation is happening and how it is going to be improved in the future Ethiopian Tourism industry. Hence, this study carried out to answer the following questions: What are the constraints of tourism industry in Ethiopia and what are the prospects of current operation of tourism industry in Ethiopia?

The general objective of this study was to identify challenges and prospects of Ethiopian tourism industry. Specifically, tries to separately identify the problems and opportunities of the tourism sector.

II. EMPIRICAL LITERATURE

According to Jackie Odudoh (Associations Kenyan tour operators, 2013) said that safety and security, lack of adequate resources and infrastructure, Poor image and perception of Africa-political instability, limited connectivity, high operating costs -fuel prices and limited and expensive air access are the most challenges of Kenyan tourism industry.

Teshale Biazen 2010, also support that the above problems and based on his research political uncertainty or disruption of infrastructure has a major influence of the tourism sector.

Essential wages in the tourism sector tend to be low in comparison to others sectors (although agriculture in many cases is an exceptional). This mostly happen as this sector income is seasonal and lost confidence of many professional experts with high salary. In return such kind of insecurity may discourage people to join this institution or to stay in for long period of time. (Bull, 1995) or employment problem is one of the bottleneck of Ethiopian tourism.

According to (Gezachew Andarege, 2013), on his finding of the study mentioned that lack infrastructure, problems of securities, lack of museum,

lack of service and facilities, lack of preservation and protections of heritage, financial constraints are the major challenges of tourism development.

According to (Nabil dabour,2003), on his study analysis lack knowledge and awareness, lack of technical knowhow and weak promotion activity, lack of tourism related infrastructure, lack of consistent tourism strategy and policy, lack of tourism safety and lack of tourism diversification is the man problems of OIC countries.

III. METHODOLOGY

a) Data Source, the Study Area and Sampling Technique

For this study, primary data was collected from foreign tourists, tour and travel companies and employees of ministry of tourism and culture during 2014/15. The information was obtained from foreign tourist on challenges of Ethiopian tourism industry such as road infrastructure, transportation system, network facility, hotel accommodations, human trained power, misperception of the images, promotion, security and prospects of Ethiopian tourism industry etc obtained through the questioners and using the interviews for the domestic tour and travel companies and employees of ministry of tourism and culture.

The study area was on Ethiopia. Among the tourist attraction areas in Ethiopia, the researchers was taken the sample from the UNISCO that registered the Ethiopian cultural and heritage place. From the registered list such as Axum's obelisks, the monolithic churches of Lalibela, Gondar's castles, the Omo Valley, awash vally, konso Cultural Landscape, Tia's carved standing, Stones, Semien National Park, and the walled city of Harar the researcher was taken only four such as the monolithic churches of Lalibela from northern part of Ethiopia, omo valley from southern part of Ethiopia, the walled city of Harar from eastern part of Ethiopia and Tia's curved stone to collect the data from foreign tourist the tourist sites in Ethiopia.

The researcher has used instruments as open and close ended questionnaires and unstructured interviews to collect primary data from the foreign tourists and ministry of tourism and culture employees, tour and travel companies respectively. To do this the researcher for foreign tourists use probability sampling techniques especially stratified sampling to create strata for tourist place. Then inside the strata the researcher was used simple random sampling techniques to collect the necessary data from the respondents. Under a simple random sampling approach, the tourist who emerged from tourist sites was chosen as the sample in this study. The researcher was distributed 150 questioners for each four tourist place.

b) Sample size determination

Under this research proposal sample size only necessary for foreign tourist. The researchers will take 600 as a sample from this amount of total population. Due to the infinite size of population the researchers will take a sample based on Bill Godden formula. The sample will take based on as follows:

Sample Size - Infinite Population (where the population is greater than 50,000)

$$SS = \frac{Z^2 \times P \times (1-P)}{C}$$

Z = Z-value A (e.g., 1.96 for a 95 percent confidence level)

P = Percentage of population picking a choice, expressed as decimal

C = Confidence interval, expressed as decimal (e.g., .05 = +/- 5 percentage points)

Z-values (Cumulative Normal Probability Table) represent the probability that a sample will fall within a certain distribution.

The Z-values for confidence levels are:

1.96 = 95 percent confidence level

$$SS = \frac{3.8416 \times 0.5 \times 0.5}{0.0016} = \underline{600}$$

c) Data Analysis Techniques

The data collected through the aforementioned research tools will be organized in a way suitable for analysis using computer software. A descriptive method of data analysis will be employed using Statistical Package for Social Scientists (SPSS) Version 16 for Windows Software.

IV. DESCRIPTIVE AND EMPIRICAL RESULTS

This part is tried to discuss and identify the challenges and prospects of Ethiopian tourism industry. The study employed both quantitative and qualitative research tool in order to produce a richer and more factual report. From 600 total samples questioners the respondents are properly fill and returned 501 questionnaires.

a) *Challenges of Ethiopian tourism industry*i. *Promotion**Table 1: Promotions*

1=Disagree 2=Neutral 3=Agree

		Item	Frequency	percent
1	Ethiopian tourism Promotion sufficient enough to promote and providing information.			
		Disagree	301	60
		Neutral	2	1
		Agree	198	39
		Total	501	100%
2	I have seen better promotional way when I compare other African countries			
		Disagree	275	51
		Neutral	10	6
		Agree	214	43
		Total	501	100%
3	I have getting what it promoted			
		Disagree	211	42
		Neutral	0	0
		Agree	290	58
		Total	501	100%
4	I have an information Ethiopia is the leading heritage register by UNISCO in Africa			
		Disagree	256	51
		Neutral	0	0
		Agree	245	49
		Total	501	100%

Source: close ended questionnaires

The above table 1 can show that the experience of Ethiopian tourism Promotion. Among the respondent 60% said that Ethiopian government have a home assignment to promote Ethiopia and provide full information about the tourist destiny. Whereas 39% respondents said that Ethiopian government sufficiently promote and provide full information on the tourist destiny and the other 1% respondent keep silent to say anything. Based on the above result the researchers conclude that Ethiopian government were backward to promote Ethiopian tourism industry and expecting a lot from the government.

Apart from the above 51% respondent still put there strong comment and own experience. They said that other African countries are much better use deferent ways of promotion to attract customer than Ethiopia. Whereas 43% respondents said that Ethiopian government better promotional way when we compare other African countries. The reaming 6% respondent keeps silent instead of to say something. Based on the above results the researchers conclude that still Ethiopia poor in promoting Ethiopian tourism when it compare the other African countries. Another issue also their expectation, According to the respondent 58% tourist said that I had got what it already promoted but the other 42% respondent said that the actual status of tourist destiny and I previously seen by different means

of promotion even by Tour Company packaging is totally different.

The researcher also raise other issue to the respondent do you have an information that Ethiopia is the leading heritage register by UNISCO in Africa. Among the respondent 51% said they didn't have information while 49% respondents said I have information. Based on the above result the researchers conclude that most of the foreign tourists they didn't have any information Ethiopia is the leading African countries to registered heritage by UNISCO.

Based the above table, the researchers also asked that the tour and travel companies about the experience of Ethiopian tourism organization to promote Ethiopia. They said that there is poor experience to promote Ethiopian tourism places for the rest of the world in different means of promotion like international channel routinely. Even there is a gap to promote tourist area to domestic visitor.

The researchers also raised the question via interview for the marketing manager of ministry of tourism and culture about the promotions of Ethiopia tourism for the rest of the world. They said that in the past can say we are not better especially for promoting Ethiopian tourism destiny for internally and externally but for the future have a plan to promote and can said that

one of the problems of Ethiopian tourism is lack of promotion.

ii. *Physical Infrastructure*

a. *Road*

Table 2: Road

		Item	Frequency	Percent
1.	I can see completed road to visit tourist place in Ethiopia			
		Disagree	256	51
		Neutral	0	0
		Agree	245	49
		Total	501	100
2.	The road facility are convenient to visit tourist place			
		Disagree	367	73
		Neutral	0	0
		Agree	134	27
		Total	501	100
2.	I can see other African countries but Ethiopia are much better road facility			
		Disagree	246	49
		Neutral	151	30
		Agree	104	21
		Total	501	100

Source: close ended questionnaires

The above table 2 shows that the overall road infrastructures in Ethiopia. The researcher also asked that completeness road infrastructure to visit tourist place in Ethiopia, among the respondents 51% said that the road infrastructure in Ethiopia are not complete to see the tourist destiny in all place. However 49% respondents said that road infrastructure in Ethiopia are complete to see the tourist destiny in all place. Apart

from this it also raised the convenience of the road, 73% respondents said that Ethiopian road infrastructure are not paved. Whereas 27% respondents said that Ethiopian road infrastructure are paved. Based on the above result the researchers conclude that most of the road infrastructure in Ethiopia are not completed and convince to visit a tourist area.

b. *Transportation system*

Table 3: Transportation System

		Item	Frequency	Percent
1.	The transportation system to visit the tourist destiny are very good			
		Disagree	275	55
		Neutral	26	5
		Agree	200	40
		Total	501	100
2	There are different and sufficient ways of alternatives to traveling (train, bus, air, ship etc.) system in inside the country.			
		Disagree	300	60
		Neutral	0	0
		Agree	201	40
		Total	501	100

Source: close ended questionnaires

As shown in the above table 3 the respondents forward their feeling about the transportation system to visit the tourist destiny. Among the respondents 55% confirmed that the transportation system to visit the tourist destiny are very poor whereas the 40% said that

the transportation system to visit the tourist destiny are good and the reaming 5% respondent said that keep in silent to say anything. Based on the above finding the researchers can conclude that most of the respondents are strongly disagree the transportation system to visit

the tourist destiny are very good. The other issue also rise to the tourists about the alternative means of transportation system to visit a tourist area. Among the respondents, 60% tourists confirmed that strongly disagreed that there is sufficient ways of alternatives to traveling system in inside the country. Whereas 40% respondents said that strongly agree that there is sufficient ways of alternatives traveling system in inside

c. Information and Communication Technology

Table 4: Information and Communication System

		Item	Frequency	Percent
1.	I can get the good internet facility, mobile phone network facility at everywhere when I was traveling to visit the tourist area			
		Disagree	501	100
		Neutral	0	0
		Agree	0	0
		Total	501	100

Source: close ended questionnaires

As implied in the above table 4 the feeling of network facility in Ethiopia especially in the tourist area. From the respondent 100% said that there is no good internet and network facility at ever where when I travel to visit tourist destiny. Based on the above finding the researcher conclude that all of the respondent are

the country to visit the tourist area. Based on the finding can conclude that there is an existence of poor traveling system in inside Ethiopia to visit tourist area.

From the interview question also ministry of culture and tourism and tour and travel company marketing manager informed that the Ethiopian transportation system are not many alternative to see the tourist attraction.

confirmed that they disagree the overall network facility in Ethiopia especially when they travel it in the tourist area.

From the interview question also ministry of culture and tourism and tour and Travel Company marketing manager informed that the internet facility in Ethiopia is poor.

Table 5: The Networked Readiness Index 2012 for sub-Saharan African country

No.		Infrastructure and Digital content	
		Rank	Score
1			
2	South Africa	1	3.58
3	Cape Verdi	8	2.78
4	Rwanda	6	2.89
5	Botswana	2	3.27
6	Kenya	5	2.9
7	Gahanna	12	2.62
8	Senegal	4	3.04
9	Gambia	7	2.82
10	Namibia	3	3.21
11	Zambia	10	2.73
12	Uganda	8	2.78
13	Nigeria	9	2.75
14	Malawi	11	2.68
15	Benin	7	2.8
16	Cotedivore	2	3.08
17	Tanzania	12	2.54
18	Zimbabwe	13	2.51
19	Cameron	15	2.21
20	Mali	20	1.86
21	Ethiopia	20	1.86
22	Lesotho	16	2.13
23	Madagascar	17	2.11
24	Burkina Faso	14	2.45
25	Burundi	15	2.28
26	Chad	21	1.77
27	Angola	19	1.98
28	Mozambique	18	2.05

Source: The Networked Readiness Index 2012

The above table 5 shows that the Africans network readiness. Among them south Africa are the top one network readiness in Africa however on the other

side Ethiopia, Mali and Chad is the lowest network readiness country in the Africa .so, this result support that the above tourist arguments.

d. Hotel Accommodation

Table 6: Hotel Accommodations

		Item	Frequency	Percent
1.	I can get good hotel accommodation in Addis Ababa			
		Disagree	211	42
		Neutral	0	0
		Agree	290	58
		Total	501	100
2.	I can get good hotel accommodation outside Addis Ababa especially in visit area			
		Disagree	256	51
		Neutral	0	0
		Agree	245	49
		Total	501	100

Source: Close ended questionnaires

Based on the above table 6 the researchers also asked that the availability of good hotel accommodation in Addis Ababa and outside Addis Ababa. From the given respondents 58% were agreed that the availability of good hotel accommodation in Addis Ababa and the 42% respondent disagreed that the availability of good hotel accommodation in Addis Ababa. The other issue the researcher checks the availability of good hotel accommodation outside Addis Ababa. Among the respondents 51% were disagreed the existence good hotel accommodation outside Addis Ababa. But the remaining 49% respondents were agreed the existence good hotel accommodation outside Addis Ababa. From the above finding the researcher can conclude that most of the respondents agreed and disagreed that the availability of good hotel accommodation in Addis Ababa and out of Addis Ababa especially tourist area respectively.

These questions also rise to the tour and travel company managers. According to them said that in Ethiopia especially in addis ababa almost all tourist are satisfied by the hotel accommodation. They get more than the expectation. Because in Addis Ababa have avail all-star hotel. So, they can reserved as they demand. However still sometimes a problem especially when exist African union is meeting and other

international meeting. The hotel accommodations problems raised that when they are move out-off Addis Ababa especially tourist destiny area. Example semen mountain when the tourists to visit the semen mountain, they will stay a couple of an hours. Even if they are interested to stay their however there is no hotel accommodation. The same things other most tourist destiny in Ethiopia

According to the ministry of culture and tourism organization report 123 hotels are eligible to the rating,3 got five star, 11 got four star and 13 got three star,10 awarded two star and 1 got one star rating. The retaining was made in accordance with the WTO standard which includes hotel grading training for 53 experts. The classification was made based on 12 international criteria. Bedrooms, bath and rest rooms, guest rooms, restaurants, kitchen, sustainability of hotel service, security and employ treatment, among others. (Source: Ministry of culture and tourism, 2015). This can show that there is no hotel accommodations problem in Addis Ababa.

From the interview question also ministry of culture and tourism and tour and Travel Company marketing manager said that the hotel accommodation in Addis Ababa is good but out of Addis Ababa especially tourist attraction area is poor.

iii. Security

Table 7: Security Issue

		Item	Frequency	Percent
1.	There is no security problem in Addis Ababa			
		Disagree	410	82
		Neutral	16	3
		Agree	75	15
		Total	501	100
2.	There is a security problem in the visit areas in Ethiopia (outside of Addis Ababa).			

	Disagree	180	36
	Neutral	14	3
	Agree	307	61
	Total	501	100

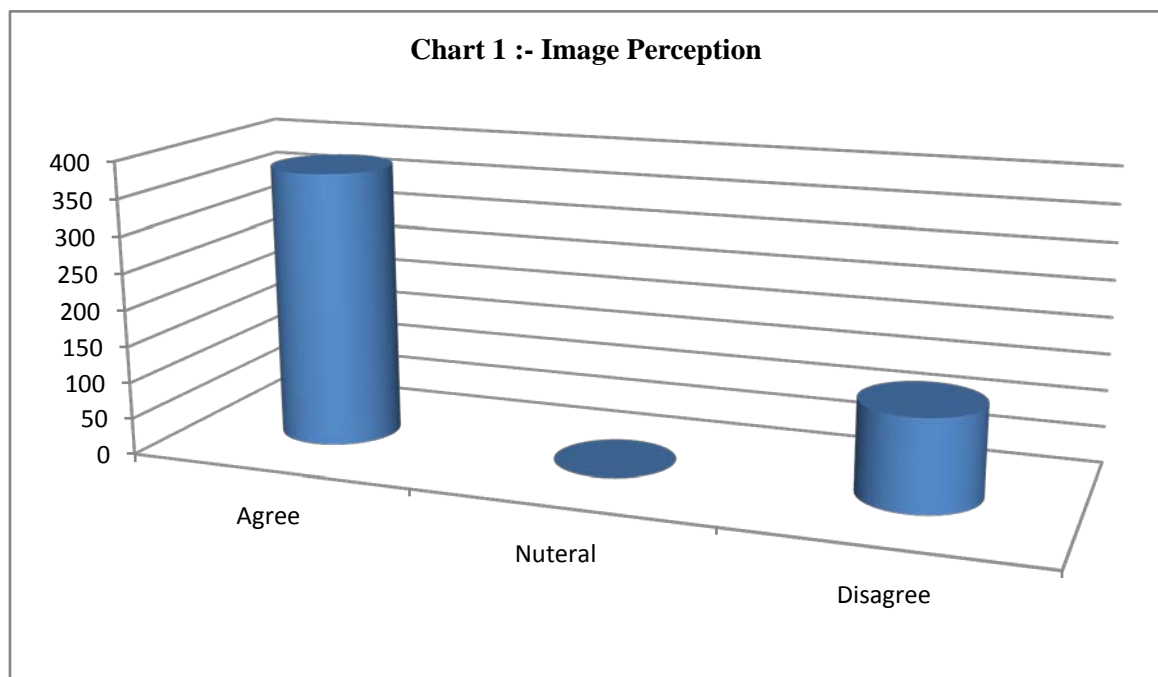
Source: close ended questionnaires

As shown in the above table 7 the researcher also raised that the security issue for foreign tourists. From the tourists 82% tourists assured that there is no security problem in Addis Ababa. Even though 15% respondents said that there is security problem in Addis Ababa. The remaining 3% respondents said that we are not an enough position to say anything about the security condition in Addis Ababa. Apart from this 61% foreign tourist also assured that there is no security problem out of Addis Ababa especially in tourist place. However 36 % respondents said that there is a security problem out of Addis Ababa and the remaining 3% respondents keep silent to say anything about the

iv. Image perception

security condition of out of Addis Ababa. Based on the above result the researchers conclude that most of the respondent confirmed that there is no security problem in inside and outside Addis Ababa.

From the interviews of tour and travel company said that in Ethiopia generally can say that there is no a security problem. Tourist still said that there is a clear difference before come to Ethiopia and the reality in Ethiopia. Tourist hears and believes that Ethiopia are not all over secure however after travelling throughout Ethiopia they can assure that Ethiopia is one the secured country in Africa.



Source: close ended questionnaires

The above chart 1 shows that the image perceptions of the tourist about Ethiopia. From the total respondents 76 % was feeling that Ethiopia is the place of indications of war, insured and not this much have tourist attraction. Whereas 24% was not feeling of that Ethiopia is the place of an indications of war, insured and not this much have tourist attraction. Based on the above data the researchers conclude that most of the foreign tourist was feeling that Ethiopia is the place of an indications of war, insured and not this much have tourist attraction.

From the interviews the researcher also asked that the marketing managers about the image perceptions of the foreign tourists. As he said that the

foreign tourists are have a wrong image especially before coming to Ethiopia they feel that Ethiopia is an indications war and an examples of poor countries however after coming and travelling across the country they totally changed their images and make a promise to comeback for the second time and will tell the actual figures of Ethiopia for the rest of friends, relatives, colleagues etc. The other thing also told me ministry of tourism and culture, Ethiopian tourism organization have a home assignment to promote the other image of Ethiopia.

An image of a destination is one of the determinants of travel behaviour. The World Bank (2006:2) presented a relation between the poor image of

Ethiopia and travel behaviour. The World Bank is stating that only 10% of 400 Africa focussed UK and European tour operators are selling Ethiopian tourism products partly due to its poor image. So, Ethiopia as a tourism destination seems to be contested because of the prevailing image causing an obstacle for a growing number of international tourist arrivals. Ethiopia's image in the international arena has been one of the darkest since 1974 revolution. "There is a widely held perception of Ethiopia that equates it with famine" (Shanka & Frost, 1999:1-3). This widely held perception comes even more clear when the Japanese government presented a feasibility study about Ethiopian tourism development stating: "The negative image of Ethiopia as a country of poverty, starvation, drought and floods is one of the main impediments to promoting Ethiopia as a tourism destination and therefore, image strategy will play a crucial role for the industry" (Japanese Embassy in Ethiopia 2007:3). Japan is sending every year more than 1.500 tourists to Ethiopia, this could be more according to the Japanese government. Shanka and Frost researched in 1999 the perception of tourists about Ethiopia as a tourist destination. A majority of the respondents, all potential tourists, indicated Ethiopia as: "famine stricken, political instable and poor marketed" (Shanka & Frost, 1999:9). This has to be seen in the light of conventional knowledge. The attention of the media on conflicts and disasters plays an important role in this. The majority of twenty tourists spoken to when in Ethiopia, in 2007, confirmed this as well. As one tourist (Interview 9-2007) put it: "Before arrival I thought to see a deserted country with hungry people, but that is not reality." Experiencing the real situation on tour changes tourist perception. The same happened in the research of Shanka and Frost. They showed their respondents video images of Ethiopia. After the video experience, perceptions changed.

V. EDUCATIONAL AND PROFESSIONAL CAPACITIES

The limited understandings of responsible stakeholders are related to the educational capacities within the CRV tourism industry. Shared knowledge about tourism development by all stakeholders contributes to the realisation of common objectives. For example by understanding international tourism standards and the link between tourism and its environment or understanding tourists needs and expectations, especially those of international tourists (HGL & GIRD 2007:107). Knowledge contributes to a proper management. Without a proper management cultural, ecological and social problems easily occur, challenging CRV's potentials.

None of the consulted regional government officials working for a department or commission responsible for tourism in the CRV has any education on

tourism and/or related issues. The most close came a director of a tourism commission which was once a geography teacher. The average education of regional governmental representatives on tourism is secondary school. That is even rounded up, because many employees had not finished their secondary education. A group of consultants already concluded this in their report on the Rift Valley, stating: "*low level of professional and trained people in the sector, relying on experience rather than professional training.*" (HGL & GIRD 2007:107). Tourism knowledge comes after working experience based upon secondary school education. Working experiences partly consist of conferences and workshops on tourism. Through those events tourism knowledge is transferred. Conferences and workshops are organised by committed NGO's and the Ethiopian government in the frame of the Ethiopian millennium. Specific subjects are mentioned during those conferences and workshops. Mostly directors visited those events. During the Ethiopian millennium the federal government focussed on tourism, because of high expectations of incoming tourists and visitors. Tourism authorities, also in the CRV, were prepared for this as a result of federal government's requirements. The preparation can be summarised as requiring hotels and restaurants to be ready to receive as many guests as possible.

In areas where tourism plays a significant role in the everyday economy more tourism related educational programs occur and are interconnected according to a director of a tour operator (Interview 11-2007). He claims that similar problems which show up in the CRV were the case on the northern tourist route before. As a result of education required after years of tourism development, for example community projects were established which changed attitudes. Especially problems in the relationship of locals and the tourism industry have been improved simply by teaching them the relevance of having a tourism industry in their region. This is an example of learning from experiences. But, the CRV tourism industry could use the experiences of the northern route in advance. Despite working experiences and education through conferences, workshops and preparing events, tourism knowledge within the CRV is low. As an experienced director of a tour-operator (Interview 12-2007) put it: "*Ethiopia does not have tourism knowledge regionally, let alone locally. They lack advisors, professionals, experts etc. everywhere Also on the federal level. Those governmental representatives are just doing something. They are not advised or what so ever.*" National and international tourism professionals can be found in the offices of International NGO's and behind private investments. Ethiopia has a turbulent political history which had consequences for tourism development in terms human capacities. From the seventies of the twentieth century Ethiopian intelligentsia emigrated because of a chaotic society as a result of

conflicting political ideologies and economic misery (Van Beurden 2004:19). The repressive Mengistu regime was ruthless in its treatment of both real and imagined opponents. During the so-called Red Terror of 1977-78, government security forces killed thousands of students and urban professionals. Because human rights violations characterized the government's policy toward dissidents, there was a constant exodus of young and educated people¹³. In relation to tourism the emigration of Ethiopian intelligentsia has been important for Ethiopia's current stage of development. The group which is mostly described as The Ethiopian Diaspora in the United States of America and Europe did play an important role in the history of Ethiopia and still play that role now, even in the tourism industry. As an Ethiopia expert, owner of a tour-operator and co-writer (Interview 12-2007) of the first tourism policy said: *"The Ethiopian intelligentsia migrated abroad. Among them were many professionals, intellectuals and powerful businessmen who could lead Ethiopia to a more prosperous future. In this period the Ethiopian government decided to develop the tourism industry. But back then we were lacking knowledge and power to get a perfect tourism industry."* Due to history Ethiopia lost human capacities which could lead the country towards a more prosperous future. For example, Kenya and Ethiopia were at the same position when the Derg took over in 1974. The current differences are a consequence of the fact that tourism knowledge left Ethiopia. Now a days there is still a lack of professionals. Human capacities within the management of the Ethiopian tourism industry are still low as an advisor (Interview 9-2007) of the Ministry of Culture and Tourism stated. There are some schools and universities, who provide an educational program on tourism, but those are not interconnected and the positive effects seem to be low. A few do approach tourism scientifically, like the Wondo Genet University in the CRV. They have an educational program on eco-tourism and wildlife management. The latter has a strong tourism component. Most of the educational programs are focussing on serving the tourism industry, like hotel and restaurant services. In some regional tourism commissions, educational institutes and in various institutes in Addis Ababa it is possible to follow an educational program for tour guiding. So, around Ethiopia there are educational programs supporting professional knowledge development in tourism. Despite this development, there is not a professional or tourism knowledge network within Ethiopia. Let alone a network which is supporting the sustainability of professional tourism knowledge. Most of the programs are unconnected. Especially in the CRV tourism knowledge is rather isolated, unconnected to each other. As a teacher on wildlife management and eco-tourism of the Wondo Genet University said: *"We have a good program but lack teachers; we do not know Ethiopian tourism professionals."* Although tourism

professional can be found close by or elsewhere in Ethiopia during conducting this research. Reasons for this can be found in the origin of each educational program. Origins of educational programs go back to the singular support and vision of organisations, as it is in Awassa where a German NGO established an educational program. The educational program of Wondo Genet also started on international donor money and program. As a teacher (10-2007) stated: *"we have to find professors who could teach us."* It comes to the commitment of managements and the demands from students if tourism knowledge is imported. Educational programs funded by NGO's do establish the basics of the program itself, but lack support and commitment towards interconnecting tourism knowledge in Ethiopia. Even governmental managed universities do focus on the graduation statistics of their students, instead of looking to its contribution to the tourism industry and surrounding society. The challenge is networking professionals, intellectuals and tourism knowledge. This would contribute the tourism industry in terms of educational and professional capacities.

Based on the interviews of the marketing manager of ministry of tourism and culture it said that as you know tourism industry needs sufficient and experienced human power however when you come to Ethiopia tourism industry there is a shortage of human trained power on the tourism sector and even the existence professionals are not well experienced.

a) Opportunities of Ethiopian tourism Industry

As we know Ethiopia is a capital city of Africa because African Union located in Ethiopia in the capital city of Addis Ababa that establish in 1963. Pan African countries are meeting for many times in a year for the issue of African. Therefore this is a good opportunity to promote Ethiopian tourism industry and invite guests to visit Ethiopian tourist area. This one we can count that promoting Ethiopia tourist site to the rest of Africa. Apart from this because of existence of African union in Ethiopia by itself creates different international organizations are located in Ethiopia. This also creates a good opportunity to Ethiopia to promote and invite to visit Ethiopian tourist area.

As we know Ethiopian airlines is one of the leading air lines in African and have a direct flight across the world. Apart from this from day to day he expands their own destiny and joined in the early past in a star alliance member. So, the tourists have an access to direct flight to Ethiopia this by itself creates convinces to for the passengers and avoids further transits. So this also creates a good opportunity to Ethiopian tourism industry.

As we know it is almost the leading African countries to registered heritage by UNISCO in Africa. This also creates a pressure to increase the flow of foreign tourist in Ethiopia.

Ethiopia was started to construct a huge and the leading African man made dam the name so called Grand renaissance dam which is inaugurated by former prime minister of Ethiopia by Atomeles Zenawi. After completed this projects it also one of the tourist destiny in Africa as well as the world.

VI. CONCLUSION

Based on the above finding the researchers concluded that On the issue of promotion most of the respondents said that Ethiopian government were follow the backward system to promote Ethiopian tourism industry and expecting a lot from the government and still Ethiopia poor in promoting Ethiopian tourism when it compare the other African countries.

On the issue of physical infrastructure, the road infrastructures in Ethiopia are not completed and convince to visit a tourist are and there is an existence of poor travelling transportation system in inside Ethiopia to visit tourist area. On the other side the overall network facility in Ethiopia epically when they travel it in the tourist area are poor. However, there an existence good availability of good hotel accommodation in Addis Ababa whereas out of Addis Ababa especially tourist destiny area not good hotel accommodation.

On the issue of security most of the respondent confirmed that there is no security problem in inside and outside Addis Ababa.

On the issue of image perception most of the foreign tourist was feeling that Ethiopia is the place of an indications of war, insured and not this much have tourist attraction.

On the issue of the availability of enough tourist attractions area, most the respondents said that Ethiopia have enough tourist destiny.

On the issue of human resource in Ethiopia tourism industry there is a shortage of human trained power on the tourism sector and even the existence professionals are not well experienced.

Finally when it comes to the conclusions part of opportunities of Ethiopian tourism industry, Ethiopia is a capital city of Africa because African union was established and located in Ethiopia. Apart from this Ethiopian airlines almost the leading African air lines and star alliance member and have many direct flight across the world. On the other side now Ethiopia build one of the first man made dam in Africa so called Grand Renaissance Dam to generate power. After completing the dam it can be one of the tourist destiny in Ethiopia as well as the world. Lastly Ethiopia is one the leading African country that registered heritage by UNISCO. More or less those are a good opportunity to boost Ethiopian tourism industry.

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Commissioning Religious Heritage Value, Through Tourism: Route of the Holy Grail in Valencia

By Por Ana Mafé García & Alejandra Castillo

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Abstract- The reality of the events that happen in Europe in the late to the Holy Grail, his quest and the enhancement of the religious heritage resources - both paintings, and churches and relics - show that, increasingly a more numerous group of non-believers want to know that other heritage reality.

It is a fact that the Holy Grail admits different readings. This text aims to situate ourselves in the classical Greece and the dawn of the first century of Rome to discover those texts that already named kraters and sacred vessels. Where the metaphor was, to see them as the true force that has to guide human beings towards improved continuously.

We only proposed this reflection as a starting point to a phase of the PhD who discover how from a relic guarded in the 21st century, we can go back up to thousands of years before Christ to find his own essence.

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I. INTRODUCTION

In Valencia, capital of the Western Mediterranean, there is a truly unique religious relic for its content. It is the Cup used by Yeses in the celebration of his last Passover and which has been guarded since the dawn of Christianity in the Iberian Peninsula. We are referring to the Holy Grail, that, supported by the Vatican has been declared a "Eucharistic year of the Holy Chalice".

In the Catholic tradition, the Jubilee is a major religious event. It is the year of remission of sins and punishments for sins, is the year of reconciliation between adversaries, the year of conversion and of sacramental penance, and, consequently, of solidarity, of hope, of Justice, of the desire to serve God in joy and peace with the brothers. The Jubilee year is, first and foremost the year of Christ, the bearer of life and grace to humanity.

The Eucharistic year of the Holy Chalice was requested to the Apostolic penitentiary by Monsignor Carlos Osoro, It was asked that every five years, it was declared jubilee year of the Holy Chalice, with the annexed prerogatives, to venerate a relic of such a high memory and value, and thus, promote the Eucharistic cult, first in the Diocese of Valencia and also in how many people come to see him and venerate him in that year, and each five-year in the future.

For this reason, we wanted to create a backbone in Valencia, a road of pilgrimage, culture and legend that dignifies the history of those men who in medieval Europe followed an ideal of love, honor and defense of the weak, through the search for the Grail.

The historical route goes from the medieval city of Jaca to the Cathedral of Valencia following the ancient Kingdom of Aragon and Kingdom of Valencia.

In this scope, we wanted to introduce part of the literary sources of the Grail researched, focusing in ancient texts that use the term "vessel" in different meanings to connect it with intelligence and human transcendence.

We believe that to delve into the story of the Grail, there are necessary at least 3000 years of history, which cannot be covered in depth from a single text. This is a brief research methodology and the point of departure from the most remote antiquity until the first century of our era. Sharing three texts that show different values and attitudes that could serve as inspiration for the original text of Chrétien de Troyes.

We are part of a research team that is doing the work of dissemination and knowledge around the Holy Grail with the sole intention of consolidating a tourist route that leads to understanding, the light and the change of paradigm towards a more solidarity and peaceful society.

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Figure 1: Holy Grail of Valencia's Chatedral

II. APPROACH TO OUR RESEARCH

The Iconography as a method of study within the discipline of the History of Art, is a way of articulating the mind from a whole to the object of study in question, following moreover an approach diachronic (dealing with an event, phenomenon or event from the point of view of its evolution in time) and synchronous (knowing which is same fact occurs or becomes at the same time that another fact) phenomenon or circumstance, in perfect temporary correspondence with him, which are also studied).

Therefore, we are going to explain that delve into the *Holy Chalice* involves on one hand the religious study of the item "Grail". Why a Cup is used to bless, what elements there are setting up that story, etc. and on the other, the so-called legend of the "Grail", which has a rich iconography to analyze, from no doubt of the collective past in the West.

III. STORIES AND ITEMS RELATED TO THE GRAIL

Poet Chrétien de Troyes named the Grail in his work for the first time between 1181-1191, *Le roman de Preceval* or *Li contes del graal*. It is attached to the County of Champagne, located 121 km from Paris, in the North of France.

They appear in the novel: Perceval as a gentleman, the Court of King Arthur, a lady Blancaflor, the Fisher King, a spear, and the Grail.

As Chrétien de Troyes leaves their unfinished work after his death and this work is so good. Oral tradition makes you very quickly arrive at other places and there are recasts with local elements making it an increasingly improved history in its symbolic elements and mystery.

However, Robert de Boron in England and Wolfram von Eschenbach in Bavaria, would be who developed it in the way that he met the medieval Europe. Robert de Boron, in his *Estoire de el San Graal and Joseph d'Arimathie*, introduces a new "Joseph of Arimathea" character and is who transforms the 'Grail' Chrétien in 'The Holy Grail'. It becomes the cup of the last supper, which, as legends say, José de Arimatea later used to collect blood from wounds during the crucifixion of Christ. Boron is also the first to assert that Joseph and his family took the Grail to unspecified parts of Britain.

Wolfram von Eschebech was a German poet born in Bavaria during the 3rd century. Some have seen magical visions and esoteric-mystic ties in his work. It is said that Parzival reveals great intellectual control, a trend of cognitive, alchemical and magical. Eschenbach is a born Warrior, a warrior minnesänger of the esoteric war. Eschenbach talks about the Grail as a source of power that exudes wealth and abundance without limits, an object so solemn, that in paradise there is nothing more beautiful, quite perfect where nothing is missing and that was at the same time cluster and flower.

Richard Wagner was inspired by the works and characters created by von Eschenbach to create his operas *Tannhäuser* and *Parsifal*.

But this part of the research, we will be revealed at the second Conference, where we can see the literary maxim:

"Covers of mystery that interests you... And at the same time leaves very clear what you consider inconsequential"

IV. SOURCES OF INSPIRATION FOR THE NOVEL OF CHETIEN OF TROYES

The French poet of the century XII Jean Bodel created the name along the lines of his epic poem *Chanson de Saisnes*:

« *Ne sont que III matières à nul homme atendant, De France et de Bretagne, et de Rome la grant.* »

Jean Bodel, *Chanson de Saisnes*¹.

The matter of Britain, Arthurian myth or legend Arthurian is the collective name given to a few legends about the Celtic and legendary history of the British Isles, especially those focused on King Arthur and the Knights of the round table.

The name, differentiates the matter of Britain of other materials: the mythological themes taken from classical antiquity are the *matter of Rome*; and the stories of the Paladins of Charlemagne and their wars against the Moors and Saracens are the matter of France.

Thus, while Arturo is the main subject of the matter of Britain, classical antiquity draws at first from the time of Hellenistic extending from 330 B.C.-146 B.C.² Our mission, then will focus on trying to reveal the extent of our possibilities (I cannot read Greek or Latin, therefore I have studied different translated texts and collating this information) genesis of where some were inspired and others to build a symbol from a sign, coming to the myth.

¹ Poème épique en 8079 alexandrins, qui traite des luttes de Charlemagne contre Guiteclin, roi des Saxons. - Il existe une version courte de 4335 vers. - 3 ms : Bibliothèque de l'Arsenal, Paris (Ms. 3142, fin XIIIe s.) ; Bibliothèque nationale de France, Paris (Fr. 368, 1e moitié du XIVe s.) ; Fondation Martin Bodmer, Cologny, Suisse (Ms. Cod. Bodmer 40, fin XIIIe s.)

² Hellenistic period. Koine became the *lingua franca* far beyond Greece itself, and the Greek culture interacted with the cultures of Persia, Central Asia, India and Egypt. Besides the development of speculative thought (Hellenistic philosophy, particularly with the followers of Aristotle -Liceo, Peripatetic school, aristotelismo-, the -Academia- Plato, Stoic and Epicurean schools, and institutions - Museion and Alexandrian Library of Alexandria), significant advances were made in science and technology (geography and astronomy - Eratosthenes-, mathematics and physics -Arquimedes-, etc.)

V. SIGN, SYMBOL AND MYTH

We will analyze three words to understand the multiple readings that have an element. According to the RAE³, we have:

Sign: Object, phenomenon or action material, by nature or a Convention, represents or replaces another. It is also a signal that is made by way of blessing; as that are made in the mass.

Symbol: Element or material object which, by the Convention or association, is considered to be representative of an entity, an idea, a certain condition. The symbol of the faith, Christian or also called the symbol of the Apostles is the "credo".

Myth: 1. m. Wonderful narration located outside the historic time and starring characters from divine or heroic character.

2 m. Fictional story or literary or artistic character that embodies universal aspects of the human condition.

3 m. Person or thing surrounded by extraordinary admiration and esteem.

We see that it has three main meanings, the first fit perfectly what we understand as the Grail stories or literature of the Grail. In the second show all the characters that give life to the stories of the Grail: Perceval the Welshman, Fisher King, King Arthur, Merlin... The third meaning we find again the religious concerning, through the figure of Jesus Christ.

True love that holds the Grail, resides precisely in that "Cup" has changed in the mere sign of being a utensil to drink for became in a mythical object.

VI. FIRST "POWERFUL" DRINKS OF ANTIQUITY

The process of research carried out with the proposed trilogy consists mainly of such items that denote a special power within the literature of the Grail.

Undoubtedly the most striking element responds to the own chalice. A word of Greek origin Kylix, Bowl shaped Cup with two handles on the sides, typical of Greek pottery used for drinking and classic wine.

The search for vessels that serve this purpose to contain wine, represents a major challenge for our research. There is as well a pictorial testimony of Egyptian banquets, for instance collected in the tomb of Nebamun, in where listed pitchers of beer. And there are physical and chemical analysis carried out by researchers specialized in waste from vessels from Hierakonpolis (high Egypt) showing the use of the technique of fermentation large scale of the malts of cereals between 3500-3400 B.C.⁴ It seems that the wine

³ See sign, symbol and myth: <http://dle.rae.es/> (01/04/2016)

⁴ Salwa A. Maksoud, M. Nabil Hadidi & Wafaa Mahrous Amer (1994). «Beer from the early dynasties (3500–3400 cal B.C.) of Upper Egypt, detected by archaeochemical methods». *Vegetation History and Archaeobotany* 3 (4): 219-224. See Abstract: *Physical and chemical analyses of beer residues recovered from a vat site at Hierakonpolis*

comes later to Egypt almost a Millennium later, from Asia minor, or at least has been deducted through the archaeological study of used containers properly said to contain wine, in this case we know the amphorae of wine storage, but not so proper "cups," which research would correspond to the second millennium before Christ.

This Egyptian amphora presents a long and narrow format. Sealed with pitch was deposited at the tombs of the deceased as offerings. Tried to get translations of texts which comment on the functionality of the "cups" used to dispense the wine, but there is only pictorial evidence. It should take into account that the wine was an element of luxury to the ancient Egypt, only used by Pharaohs, nobles, and priests, although during festive periods also could access the same classes whit less affluent residents.

Looking for containers of antiquity who used expressions to deposit the wine, we reach the Greek "krater".

We are going to imagine the text of Trismegistro, Corpus Hermeticum of Hermes. Texts that source was translated by J. Sanguinetti is the texts attributed to Hermes Trimegistro, the three times larger, father of hermetic philosophy. The source of these texts is manuscripts from the end of the middle ages and the 14th and 15th centuries. It is believed that the manuscripts are copies of others that have been lost in the course of the story of the man. The translated texts come from its version in Greek with the exception of the Asclepius whose manuscript is in Latin. It is believed that the Greek version is a translation of the Egyptian original.

Parts of these passages are considered one of the most significant among the literature of religions of the world.

You have to know that when the text named the "krater" word refers to a large, wide pot where the Greeks mixed wine and water of their treats.

"3. Of the reason, o Tat! God did participate to all men, but not intelligence: and has not done so because cele (wary) of man, because mistrust (and jealousy) does not come from the top, are born here below in the souls of men who have no intelligence.

– *And why, therefore, oh father, God has not given all the intelligence?*

(Upper Egypt) were carried out. Radiocarbon dates of the residues suggest a dating of 3500–3400 cal B.C. and are believed to represent the oldest known beer in the world. Macroscopic and microscopic examinations of the residues revealed the presence of intact remains of grains and spikelets of wheat and barley, as well as fragments of dates and grape pips. Chemical analyses included percentages of sample ingredients, pH and total soluble ions, quantitative determinations of sugars, carboxylic acids and free amino acids. A total of 25 compounds were identified, which are components of fermentation processes that are believed to have formed in connection with the preparation of what is called Nekhen-Hoffman beer.

- *Because, my Sonny, wanted to put before the souls as combat award.*
- *And where to put it?*
- *I sent to Earth a huge crater of intelligence, beta Herald and commanded him to proclaim to the hearts of men as follows: "swim in this crater of intelligence you that you are able, you that you think that you return that sent it, you who know to what ever born!"*

Therefore, all those who accepted the message and bathed in the intelligence, all became part of the knowledge and became perfect, inviting men of intelligence. Instead, all who refused the message, these are the "rational", which sought not intelligence, which ignore why were born and who they come from.

5. The feelings of these men are similar to the irrational animal, and his temperament is passion and anger, are unable to admire the sight of seeing, formerly dedicated to the pleasures and bodily appetites, and think that men born for that.

On the contrary, they were made partakers of the don de Dios, o Tat!, this, by comparison of behaviors, are immortal in opposition to those, (the) mortals: include all the things, which are in the Earth, which are in heaven, and what can be found beyond the sky on its own intelligence."

Plato (428 B.C. – 347B.C.) a follower Greek philosopher Socrates and teacher of Aristotle. Plato, *The banquet*.

"Socrates sat and said: -would be good, loved, that wisdom was a thing of such a nature that put us in contact with each other, it flowed from the fuller to the emptier of us, as the water flows in the treetops, through a thread of wool, the fuller to the more empty.

And if the wisdom behaves also as well, I appreciate highly to be reclining next to you, because I think that I would be your lot and beautiful wisdom."

Plato, *Timaeus*.

Talks about the formation of the universe and man.

"On the bones, meat and other things of this nature, he here I must say. All have their beginning with the formation of bone marrow. By being linked to the bone marrow, is why the bonds of life, through which the soul is United to the body, are like the roots of the deadly species; in regard to the same bone marrow, comes from various elements. God took, between the triangles, who, being early, regular, and smooth, were capable of producing the most exactly the fire, water, air and Earth; separated them from the genera to which they belonged; mixed in proper proportion with the other; and thus preparing the universal seed of the deadly species, formed the bone marrow.

Then he planted in the bone marrow and she joined to all genres of souls, and as should receive different forms and different shapes, divided it from this first operation, in this same form.

A party was, as a fertile field, enclose the divine seed; he rounded it all over, and this portion of the cord, called a brain; because, serious head, in the full animal, as the vessel that would contain it.

The other part of the marrow, intended to serve as a seat of the mortal soul, was divided into round and wide forms, and retained the name of bone marrow in its whole extension. God linked to it, a way of anchors, ties of life, building throughout the body in the same winch, after having been sheltered by a bone carver.

(...)

Let's here stop to our discourse about the universe. This has been formed this world that understands the deadly animals immortal e, given that it is full; visible animal where are all visible animals; sense God, the image of the intelligible God; single word of one nature, which is very large, very good, very beautiful and absolutely perfect."

Petronius⁵, *The Satyricon* (L)

"There was a copper-smith that made glass vessels of that pliant harness, that they were no more to be broken than gold and silver ones: It so happened, that having made a drinking-pot, with a wide mouth of that kind, but the finest glass, fit for no man, as he thought, less than Caesar himself; he went with his present to Caesar, and had admittance: The kind of the gift was praised, the hand of the workman commended, and the design of the giver accepted.

He again, that he might turn the admiration of the beholders into astonishment, and work himself the more into the Emperor's favor, pray's the glass out of the Emperor's hand; and having received it, threw it with such a force against the paved floor, that the most solid and firmest metal could not but have received some hurt thereby.

Caesar also was no less amazed at it, than concerned for it; but the other took up the pot from the ground, not broken, but bulged a little; as if the substance of metal had put on the likeness of a glass; and therewith taking a hammer out of his pocket, he hammered it as it had been a brass kettle, and beat out the bruise: And now the fellow thought himself in Heaven, in having, as he fancied, gotten the acquaintance of Caesar, and the admiration of all: But it fell out quite contrary: Caesar asking him if anyone knew how to make this malleable glass but himself? And he answering, there was not, the Emperor commanded his head to be struck off: 'For,' said he, 'if this art were once known, gold and silver will be of no more esteem than dirt.'

⁵ PETRONIUS ARBITER (S. I A.C). THE SATYRICON. Translated by William Burnaby. http://pdfbooks.co.za/library/PETRONIUS_ARBITER-THE_SATYRICON.pdf (12/04/2016).

VII. CONCLUSIONS

There are several conclusions that we obtain immediately. First, the classical literature was well known in Medieval Europe. The interpretations that are given to the vessels, chalices and craters are always related to intelligence. This intelligence is what leads to the immortality of the human being, the highest aspiration of the knights of the time, where immortality was associated with a state of perfect health, rather to the possibility of passing from generation to generation through the heroic witness of life.

Therefore, the fact that they have found examples of pottery, shows that there really was a natural partner knowledge about these objects. Uniting these beliefs to the object of the Holy Grail, it was what finally established history of Chretien de Troyes to immortality. Hence, hundreds of years after its writing, there are still people in Europe seeking to reach that perfect knowledge through the Grail legend, what exactly is in the Cathedral of Valencia and you can visit today. The reflections on these words believe that it should make them each one of us, their intimacy of human being because we are all one under the same Sun and there are so many ways to get to the truth as human beings willing to plunge into the *krater* of wisdom.

From the study of the heritage, it is ours to offer tourism specialists, enforcement products, well-documented stories with the intention of recreating legends and history that provide real experiences of knowledge and internal growth. Tourism deserves to be equipped with knowledge, tradition and legend, well informed and always open to a constant reflection.

From Valencia, in constant study with literary sources from the past, we are building the basis of the route of the Holy Grail, which will generate a new spirit of well-being and relationships between those wishing to undertake this route which covers the legend, history and religion. All contemplated from the broadest respect.

The path of the Holy Grail is a European route with the aim of bringing people under a same theme: the search for the human essence through personal reflection.

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Challenge and Prospect of Ethiopian Tourism Policy

By Yimer Ali

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Keywords: *tourism policy, attractions, challenge, prospect.*

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Keywords: tourism policy, attractions, challenge, prospect.

1. INTRODUCTION

As tourism continues to become more competitive, governments having to adopt a more entrepreneurial role in attracting not only tourists but also investors to their region. For instance in Ethiopia with growing tourism the government expanded infrastructures like road, new air port destinations, vehicles and hotels (private and governmental) etc. The questions raised surrounding tourism as a regional development tool deal with whether or not there can be real regional economic dispersion of the benefits of tourism. Tourism development projects, which do not build strong linkages to the surrounding community, will have little impact on the citizens who live nearby. Questions need to be asked about the most appropriate forms of tourism development growth poles so that the trickle-down effect can be maximized. While tourism may help to modernize a region, it may also cause the region to become dependent on external organizations.

It is argued that community-based, grassroots tourism is a more sustainable form of development than conventional mass tourism as it allows communities to break away from the hegemonic grasp of tour operators and the oligopoly of local élites. It is argued that there needs to be a decentralization of tourism down to the community level. When I take this one to Ethiopian

context, it is necessary for enhancement of tourism as well as generating additional funding, which circulates in the local community/population, self-esteem is enhanced for the community as control over the development process is maintained locally. Developing community-based tourism can be especially difficult in developing countries in term of such issues as access to information, lack of awareness and lack of access to finances and policy frame work. The peripheral nature of many communities interested in community-based tourism development raises questions as to how they will attract visitors.

Much of the research on tourism employment is based in a western-centric, developed country perspective where tourism positions are often considered as seasonal and low paying. There for developing countries like Ethiopia has not earn sufficient income from tourism sector. In a developing country context, however, employment opportunities are more limited but have higher relative rates of payment than in other economic sectors. Even if positions are seasonal they are highly sought after. When possible policy set properly, tourism employment can create opportunities for the local population to increase their income and improve their standard of living. It can also provide new opportunities for youth and women. A model based on service-centred tourism employment was presented as much of the work in tourism employment research has borrowed models from manufacturing and related models of production. Here, the gap between the concepts of socioeconomic development and socio cultural impacts of tourism development was explored. Many of the predominant theories of development have emerged from western schools of thought without much consideration being given to more traditional methods of development. Classifications of the major indices for social and economic development including income, trade, resource and quality of life are based within a western or modernisation framework. Within this framework, both economic development and the modernisation of living standards are expected to go hand in hand. However, indigenous lifestyles and the customs of some host communities, for example, are valuable commodities and movement to modernise these societies is criticised by the tourism industry. As a solution developing countries like Ethiopia should have to prepare tourism policy in considering this and other threats. By examining the complex nature of the

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relationship between the positive and negative impacts of tourism the writers argued that the applicability of measuring socioeconomic development based in a western framework to understand tourism development needs to be questioned (like Africa).

To determine the policy impact on the host's society, it analyses differently in different place. After tracing the evolution of sustainable development it was then argued that sustainable tourism development has failed as a result of environmental managerialism inherent in sustainable development principles. Attempts at imposing a universal blueprint for tourism development, or the using of a set of 'meta-principles' which are founded on mainstream planning and designation processes, are inappropriate within the complex developmental contexts and the needs of tourism destinations particularly in developing countries. A more relevant interpretation of tourism and sustainability in terms of what it is and how it can be achieved is necessary. It was argued that concepts be utilized in non-western settings? Again, is there a successor to sustainable tourism development?

While tourism has potential to contribute to the economic and social development of a destination, there are characteristics of the industry, which limit its potential as a development tool. The emerging global power structures of the tourism industry can take control out of the hands of the destination leaving only the local élites and multinational corporations to benefit. It was also argued that tourists themselves are more generally interested in themselves and their needs as opposed to altering their form of consumption to maximize the benefits of tourism for the destination. Though the Ethiopian government drafted the tourism development policy in order to maximize benefit and accelerate Ethiopian tourism industry from its low stage.

II. OBJECTIVES

As Ethiopia is blessed with abundant natural tourist attractions, the primary objective of the study was to clearly assess the challenge and prospect of Ethiopian tourism policy.

III. LITERATURE REVIEW

a) *Historical Development of Tourism in Ethiopia*

According to the ministry of tourism and culture, tourism as one of the economic sector came into being in Ethiopia very recently. It was around 1960, that the potential of tourism drew the attention of the imperial government authorities. The first tourism office was established in 1962. However, a set back in international tourism demand had been seen during the military regime

From 1974 for two decades the industry was suffering from various adverse effects such as prolonged civil war, recurrent drought and restrictions

on entry and free movement of tourists (World Bank, 2006). Though the sector is still at its infant stage, it has been keep growing since 2001. The total receipt from the industry in 2008 was around 204.9 million USD. As of 2008, international tourists arrivals was reached to 383,399. However, the sector's share to GDP is remains very small (0.77% in 2008).

Successive Ethiopian governments have promoted tourism during their tenures. The monarchy that mediated politics, economics, culture, environment and technology for most of the 20th century initiated the promotion, marketing and development of tourism as an integral part of the overall dynamics of national development. Ethiopia's existence as an independent country for thousands of years and the diversity of its ecology and culture were images that captivated foreigners for a long time. The promotional logo of 'Thirteen months of Sunshine' was interjected by an imaginary of a proud and cultured people professing the two major universal religions of the world-Christianity and Islam and an ethnic religion of Felasha Jewry. The magnificent material iconographies of Ethiopian culture were relayed to the visitor through the timeless architectural wonders of Axum's stele, Lalibela's rockhewn churches, Gondar's Castles, Harar's medieval walled city and archeological sites that traced the origin of homo-sapiens to the Rift valley where the skeletal remains of Dinkinesh (Lucy) and Selam were discovered.

Marketing and promoting have been, however, the weakest areas of tourism development. The negative imageries that framed the country following the famines and political strife of the 1970 -1990 period defined tourist perceptions of the country to a considerable extent. Some tour promoters have even gone further by proposing that the tourist gaze in Ethiopia was a moralistic experience. Such perspective was suggested by "Lonely Planet" in the following introduction of the tourist experience in Ethiopia as "testing, inspiring and heartbreaking-a journey you will never forget. You do not explore Ethiopia for a relaxing getaway, you venture here to be moved and moved you should be" (<http://www.lonelyplanet.com/Ethiopia>) (Tadesse Kidane-Mariam, 2015).

Ethiopia's possession of varied attractions regarded as an opportunity for the tourism sector policy. However at present the Ministry identified the following major challenges also confronting the sector:

- Heritages of the country has not been adequately protected, developed and used as a tourist attraction.
- There is a serious shortage in number and type of tourist facilities. Moreover, the quality of service is poor and unsatisfactory to tourists.
- Performing arts, entertainment services and other local creative products, which could have helped to

lengthen the stay of visitors, are not offered in sufficient variety.

- There is a shortage of trained manpower that is crucial to the development of the sector.
- Weak mutual support and coordination among tourism stakeholders.
- Ethiopia's image on the international scene is widely associated with draught, famine and war.
- The horn of Africa is regarded as a region of instability and terrorism.

b) *The roles of state level institutions and policy measures*

Currently there are eleven regional cultural and tourism bureaus in Ethiopia, which are accountable for the Ministry of Culture and Tourism (MCT). Apart from the Ministry, these regional bureaus have also their own five year strategic plan. However, their independent initiatives lacks coordination with other stakeholders including the Ministry.

Regarding policy issues since 2005, the government's initiation to promote tourism has been increasing. Starting from public statements issued by the Prime Minister supporting tourism there are indications that the government is opening a committed dialogue on tourism

"My government believes that an increased focus on tourism can play more significant role in the war on poverty, both in Ethiopia and across Africa as a whole"
PM Meles (2005) Adapted from World Bank (2006)

The first tourism development policy of the country was enacted in August, 2010. Lessening the aforementioned challenges was the origin for this policy initiative.

In line with the tourism development policy, MCT introduce a strategic plan for the sector every five year. However, the strategic plan (2010-2015) designed more ambitiously so as to fit the objectives of GTP in the tourism arena.

- Some of the following figures make the plan more ambitious;
 - i. To increase a tourism receipt from the current 250 million USD to 3 billion USD.
 - ii. To create a tourism jobs for 3.5 million citizens.
 - iii. To achieve a tourism promotion activities by 100%
 - iv. To increase tourist's service satisfaction from 51% to 90%
 - v. To improve the capacity of implementing international agreements and conventions from 25% to 90%

c) *The undone roles of stakeholders in implementation*

Most of the stakeholders such as the federal government, regional government, private sectors and local communities are not fully playing their roles in implementing the policy. (Temesgen K., 2014)

Among these undone tasks, the followings are the major one under different stakeholders;

- A. Federal and regional governments
 - To expand and improve the development of infrastructural facilities
 - To capably coordinate and lead vigorous marketing and promotion activities
 - To ensure the psychological and physical well-being of visitors
 - Protection of heritages in collaboration with local communities
- B. Private sectors
 - To participate in the provision of quality tourism services in types and capacities required
 - To involve in the expansion of infrastructure needed in the localities of major destinations
 - To participate in the protection of attractions
 - To participate in associations for mutual support
- C. Local communities at tourist destinations
 - To provide appropriate care to guests visiting the local attractions
 - To protect cultural and social values from negative influence of tourism
 - Conserving cultural resources with a sense of ownership

The ambitious Growth and transformation plan II (GTPII) which has been implemented now expected to fill the gaps. To this end **Ministry of Culture and Tourism** of Ethiopia has targeted to earn six billion USD revenue from the **tourism sector** in its second Growth and Transformation Plan II. The contribution of the tourism sector to the country's GTP so far is about 1.2 percent and that it is now planned to raise its contribution to 5 percent. Indeed the influx of foreign visitors to Ethiopia has shown an average growth of 10 percent in the past seven years, the average tourist staying period rose up to 16 days. the tourism sector has created 783,638 jobs for citizens in the last four years of the first GTP. Standardization of 400 star ranked Hotels has begun in the nation to increase the service quality delivered for the foreign visitors adding that International accredited standardization activities so far conducted on 50 hotels in Addis Ababa city.

IV. PROJECT DESIGN AND METHODOLOGY

Relevant and necessary data was needed for this article to reach at final conclusion and to answer the challenge and prospect of Ethiopian tourism policy. Therefore it employed a qualitative approach to collect the necessary and relevant data. The study was also needed to conduct the necessary and reliable information by reviewing the available documents and needed to make a link or connection between different variables contributing to the challenge of tourism sector

in Ethiopia. In addition to this the researcher used field observation to assess the tourism industry in Ethiopia

V. RESULT AND DISCUSSION

a) *Definition and Reality about Ethiopian tourism*

Tourism holistic definition that embraces both the factual and theoretical perspectives of tourism is desirable (Gilbert, 1990). Jafari (1977) goes some way to achieving this by epistemologically defining tourism as 'The study of man away from his usual habitat, of the industry which responds to his needs, and of the impacts that both he and the industry have on the host's socio cultural, economic and physical environments. Nevertheless, tourism is primarily a social activity. If people had neither the ability nor the desire to travel from one place to another, tourism would not exist.

Thus, tourism is an activity which involves individuals who travel within their own countries or internationally, and who interact with other people and places, people who are influenced and motivated by the norms and transformations in their own society and who carry with them their own 'cultural baggage' of experience, expectations, perceptions and standards. It is, in short, a social phenomenon which involves the movement of people to various destinations and their (temporary) stay there or across the world.

As a land of multiple tourist attractions and a visitor friendly people which is conscious of its historical heritage, Ethiopia is truly a country of great tourism potential. It was this recognition of a great potential that encouraged Ethiopia in the 1960's to start a tourism industry. After an initial period of rapid growth, the industry underwent a fast decline and virtual stagnation for many years due to the revolution that brought the military to power in 1974, the consequent turmoil, and recurrent drought and famines.

During the last years, however, tourism has once again emerged as a growth industry taking advantage of the current peace and stability in the country and the liberalized economic policy of the new government. Ethiopia can now look forward to increasing its share of the world's tourism market which is registering a faster world-wide growth than most other industries.

Not all of Ethiopia's attractions are very widely known, but some are quite famous. Indeed, nine (9) national attractions (including, konso) have been recognized by UNESCO as world heritage: Axum's obelisks, Gondar's castles, the island monasteries on Lake Tana, Hadar (where Lucy was discovered), Tia's carved standing stones, the walls of Harar, the Semien National Park, and konso tradition and culture. Therefore the need for tourism policy now and then is unquestionable.

Ethiopia's nearly ideal location on the African continent and its relative proximity to the Middle East

and Europe can add to the comparative advantage which its numerous and varied attractions bestow on it. Though situated not far from the equator, much of the Ethiopian land has a climate tempered by high altitude. Ethiopia's tourism slogan "Thirteen Months of Sunshine" partly arises from the idyllic year-round, spring-like climate of most regions of the country. The first Ethiopian development plan was historically prepared in 1966. Then after the tourism industry was became as one sources of economic development until 1966. Through different years the sector show improvement in 12% within a year in average. During the Dreg regime tourism faced challenges like, war, drought and famine, ideological difference with western countries which are source of tourist and lack of concrete tourism policy which gives opportunity and guarantee for tourist sites was some of the challenges.

The Ethiopian Ministry of Culture and Tourism is responsible for developing and promoting the country's tourist products both locally and internationally by putting on ground the policy and strategy. It works closely together with different international and national stakeholders, the latter including Ethiopian Airlines, the Ethiopian Tour Operators Association (ETOA), and the Tourist Standard Hoteliers

According to ministry of culture and tourism, Ethiopia has a big size of population with diversified cultures that makes it an ideal tourist destination. So the country should also focus on inward looking programmes in terms of developing, promoting and expanding local tourism. The Ministry in its duties and powers is playing a decisive role for a concerted and multipurpose effort to be undertaken by the people and stakeholders in the development of tourism and culture. Since the tourism industry is now globally lucrative, and one of the largest baseness in the world economy, preparation of various regulations, directives in order to study, preserve, control, register and conduct inventory of tangible and intangible cultural heritages apart from quality control and classification of standards in tourism area are some of the major areas that the Ministry focused in the 5-year strategic plans so that Ethiopia could be able to benefit the most out of the sector.

b) *The need for tourism policy*

Since Ethiopia endowed with enormous manmade and natural tourist attraction area, having uniform tourism policy is unquestionable. Seventeen years of neglect "After the overthrow of the imperial government in the 1960s and the coming to power of the socialist government in 1970, our country had a military government whose relations with tourist generating countries in Europe and America were bad", she explained. "For seventeen years, tourism was sorely neglected in our country by considering its socio-political, economic and cultural advantage, the current government launched tourism development policy in

2009. Ethiopia whose share of tourist flow to the East African Region of seventeen countries was at **less than one percent** in 2009 launched its first tourism development policy to reverse the situation.

The arrival of a new government in 1991 brought the first change, with greater emphasis on a free-market economy, improving infrastructure and the construction of new roads, highways and airports. "Our present government considers tourism to be an industry with great potential for our country", says Dalacho, ministry of culture and tourism. "That's why the ministry of culture and tourism was formed to replace the tourism commission." As head of this ministry, recently finished drafting a new tourism policy for the government. Its main focal points include the following:

- Develop existing and new destinations with Ethiopia;
- Diversify the sector ;
- Improve infrastructure and tourism facilities;
- Create an enabling environment for private investors;
- Develop new and broader educational programmes for the sector so as to create a larger and more qualified labor force.

The government also aims to establish 'Tourism development Fund' with the key aim of mobilizing resources and capabilities of actors in the implementation of the policy. The establishment and application of the fund will be determined by a study and supported by law, according to the Policy launched at the Sheraton Addis in August 30, 2019. The new tourism policy of Ethiopia among other, aims to integrate/connect the development of the country's tourism with agricultural, industrial, foreign policies and strategies of the country.

c) *Ethiopian tourism policy and strategy*

i. *Vision*

To develop tourism in a responsible and sustainable way, enabling it to play a leading role in the economic development process of the country by executing its activities on a community based principle.

ii. *Principles*

- ✚ *Respecting diversity:* Diversity of historical, cultural and natural wealth are the beauty and distinctive Features of Ethiopia; therefore, each of these has to be known, respected, and developed equally as tourism attractions.
- ✚ *Ensuring participation and community benefits:* Communities have to play a major in developing of the tourism industry, with each member participating and benefitting in the development process.
- ✚ *Create a transparent and accountable work process:* The process of tourism development requires the participation of many actors or stakeholders.

Therefore, a good governance procedure shall be prepared in order that all stakeholders abide by professional tourism ethics.

- ✚ *Create a sense of cooperation and coordination:* Initiating continuous and good networking by creating strong cooperation communication and close relation between Regional, National and international bodies working in the tourism sector.

- ✚ *Enhancing implementation capacity of the sector:* To ensure the comparative advantage of the country in tourism development, by strengthening the implementation capacity of all parties in the sector to provide high quality tourism services

iii. *Objectives*

- ❖ To consolidate the country's comparative advantage and enable the industry to compete in international tourist markets.
- ❖ To develop a tourism industry that can play a major role in generating and retaining international exchange
- ❖ To create increased employment opportunities for communities around the sites of attractions and distribute tourism income to improve living standards of the people.
- ❖ To build a tourism industry that can improve the image of the country and advance the growth of the sector in a sustainable manner.
- ❖ Promoting the country's tourist attractions and encourage expansion of local tourism
- ❖ Making the sector competitive in the world and Africa in its best destination for tourists and source of income for host country in direct and indirect economic benefit will be ensured.
- ❖ Bringing both culture and tourism to development so that the industry would contribute to the poverty reduction strategic plan and the Millennium Development Goals.

d) *Main issues of the Ethiopian tourism policy and strategies*

- To lead the country's tourism industry in a broad-based developmental direction

Though the strategy will give emphasis for:

- Creating strong relationships with other development strategies and policies to integrate directions .Here especially interlinking and connecting the tourism policy with agricultural and rural policy and strategy which helps to expand tourism attractions like eco-tourism in rural and agricultural areas. This coordination or chain of the rural to urban tourism used the sector direct beneficiary from on growing rural tourism development and give/provide input and artistic product for the urban tourism development as value chain. Indeed the policy strategy focus on :
- Development of the tourism environment

- Ensuring participation
- Increasing visitor volume
- Strengthening linkages in a cross-sectoral approach to poverty reduction
- Sequential development to avoid conflicts associated with mass tourism elsewhere
- To Develop new attractions and improving existing ones considering type, quality and quantity; possible strategy is:
 - Developing high quality destinations and productions such as handicrafts
 - Increasing flows of tourists in areas of the counties that are not in the current circuits
 - Linking tour circuits to create a strong tourism package
- To develop crucial infrastructure and service delivery institutions
 - Capacity building of federal and regional implementing structures
 - Development of land and sea transport infrastructure, telephone and internet facilities and energy supply networks
- To make Ethiopia a competitive destination in the world tourism market
 - Creation of an effective tourism promotion strategy
 - Market analysis
 - Building partnerships with domestic and international tour operators
- To coordinate the efforts of stakeholders
 - Formation and consolidation of trade organizations
 - Establishment of new fora:
 - Tourism Management Council formed by officials from federal and regional tourism offices
 - Government Tourism Common Forums formed from the relevant federal and regional executive bodies with NGOs, institutions and private sector stakeholders with interests in tourism
- To increase the current low capacity of the tourism industry
 - Increase the capacity of major industry players with the introduction of professional standards for service providers
 - Establishment of tourism training and education centres to address shortcomings in human resources development
 - Improve the capacity state tourism institutions and systems in research, information dissemination and data collection and the creation and periodic publication of tourism satellite accounts.

The main thrust of this policy looks encouraging. Particularly important is the recognition that, in addition to providing a source of international exchange, the tourist sector can have a significant development impact through linkages with local

communities. Also Government has clearly recognized the need to improve the competitiveness of the tourist sector and that improving the quality of tourism services is key to enabling Ethiopian tourism to compete in international markets and attract more tourists. Welcome also is the fact that Government clearly recognize their role in providing an enabling environment: through training of the workforce; provision of more accurate information; coordinating stakeholders including working with tour operators. In short, my view suggests that the thrust of this draft policy and implemented policy correctly addresses the key issues facing the tourist sector. As such, the tourism policy should be completed, ratified and implemented again correctly to strength more.

e) *The advantages of tourism in delivering pro-poor growth*

The negative impacts associated with tourism, such as reduced access to resources and negative social and cultural impacts sometimes threaten to overshadow the benefits that a vibrant tourism industry can generate. However if the policy implemented properly it will have the following benefits:

- ✓ Tourism is generally labour-intensive – although less than agriculture – and therefore can impact on a large number of lives through the labour market;
- ✓ Tourism has considerable potential linkage, especially with agriculture and fisheries, which can minimize the 'leakage' effect. Due to the high income elasticity of demand for international tourism, it can offer a relatively rapidly growing market;
- ✓ Tourism provides opportunities for off-farm diversification, particularly in areas that do not attract other types of development options;
- ✓ Tourism can provide poor countries with significant export opportunities where few other options are viable;
- ✓ It may create initial demand for a good or service that can itself develop into a growth sector;
- ✓ Tourism products can generate demand for assets such as natural resources and culture, to which the poor often have access;
- ✓ Tourism delivers consumers to the product rather than the other way around; and
- ✓ Infrastructure associated with tourism development can provide essential services for local communities.

Indeed, throughout the world, the most compelling reason for pursuing tourism as a development strategy is its alleged positive contribution to the local or national economy. Internationally and locally, tourism represents an important source of foreign exchange earnings; indeed, it has been suggested that the potential contribution to the national balance of payments is the principal reason why governments

support tourism development. For many developing countries, tourism has become one of the principal sources of foreign exchange earnings whilst even in developed countries the earnings from international tourism may make a significant contribution to the balance of payments in general, and the travel account in particular. It is also one of the reasons why tourism is frequently turned to as a new or replacement activity in areas where traditional industries have fallen into decline.

The economic benefits (and costs) of tourism are discussed at length in the literature, as are the environmental and socio-cultural consequences of tourism. When we see Ethiopia various tourism sectors such as hotel, tour sites, natural and manmade caves, monuments, historical religious places etc are become tourist destination areas. This is because of the promotion made by ministry of culture and tourism after the policy preparation and other organs, and by the improvement of facilities in tourist attraction areas. Gradually Many of these are considered in the context of development. The main point here, however, is that the widely cited benefits and costs of tourism, whether economic, environmental or socio cultural, are just that. They are the measurable or visible consequences of developing tourism in any particular destination and, in a somewhat simplistic sense, tourism is considered to be 'successful' as long as the benefits accruing from its development are not outweighed by the costs or negative consequences. For many developing countries, with a limited industrial sector, few natural resources and a dependence on international aid, tourism may represent the only realistic means of earning much needed foreign exchange, creating employment and attracting overseas investment.

Tourism in most sub-Saharan African countries is hardly an industry since the tourism infrastructure is weak, tourism organization is poor, and net revenue is meager. But now gradually Ethiopian is forwarding its base currently on tourism sector. Almost all tourist arrivals consist of African nationals' resident abroad returning to visit friends and relatives, business visitors, and those visiting expatriate residents. The primary vacation or leisure tourism sector is undeveloped (Teye, 1991, p. 288)

f) *Ethiopia's Historical & Natural Tourist Attractions*

Currently, travel and tourism account for more than \$3 trillion in spending annually and 7.6 percent of the world's total employment. The United Nations World Tourism Organization further forecasts that international travel will double by 2020. Since a couple of decade, ecotourism has become a newer paradigm to tourism because in addition to offering economic and business opportunities for local communities, it strongly advocates reducing the environmental impact of travel, conserving natural resources, preserving cultural

heritage, empowering and meeting the welfare of local people, and creating value for the travelers. It adds value to environments, communities, entrepreneurs and tourists within ethical objectives

The natural beauty of Ethiopia amazes the first-time visitor. Ethiopia is a land of rugged mountains (some 25 are over 4000 meters high) broad savannah, lakes and rivers. The unique *Rift valley* is a remarkable region of volcanic Lakes, with their famous collections of birdlife, great escarpments and stunning vistas. Tisisat, the blue Nile falls, must rank as one of the greatest natural spectacles in Africa today. With 14 major wild life reserves, Ethiopia provides a microcosm of the entire subsaharan ecosystem. Bird life abounds, and indigenous animals from the rare walia ibex to the shy wild ass, roam free just as nature intended. Ethiopia, after the rains, is a land decked with flowers and with many more native plants than most countries in Africa.

The natural side of Ethiopia is an invaluable asset for its tourism industry, and inextricable from its cultural and historic features. Sustainable tourism, while preserving Ethiopia's natural environment, also serves to preserve the nation's rich cultural and environmental heritage. Ethiopia is endowed with a wide range of tourist attractions. Ecotourism potentials include paleo-anthropological sites-the famous finding of a hominid, Lucy; historic architectures such as the stelae and temples in Axum and Yeha; the monolithic rock-hewn church of Laliibela; the Castle of Fasilades in Gondar; the island monasteries of Lake Tana; the Camelot of Harar; the holiest mosques of Ahmed Negash in Tigray, the Sof Omar in lowland Bale; the scenic beauty of the mountains of the Semyen, Wag and Lasta, and Bali; the Rift Valley lake; the Omo valley; and the fauna and flora that flourish in the natural terrains of the country. In addition, the myriad peoples of Ethiopia are very proud to deliver to tourists the original version of their subcultures including social organizations, artifacts, music, languages, religions, etc.

Ethiopian topography is endowed with gorgeous scenes of lofty peaks and enumerable species of wild life and birds. The country has a remarkably rich heritage and spectacular environment worth visiting by tourists interested in gaining knowledge of its history, culture, diversity of landscape, unique indigenous plants, birds, and mammals, and a great variety of interesting locations. Sight Seeing, Fishing, Bird watching, Safari Tours, Camping, climbing, Trekking, Hiking & Walking, Water Sports, Caving etc could be mentioned as some of the interesting opportunities to invest on Ethiopian Ecotourism.

g) *Type of Tourism offered by Ethiopia*

Ethiopia's wealth of varied attractions gives it a great potential for cultural and educational tourism, photo safaris, hunting safaris, bird watching, water sports including river rafting, desert trekking, mountain

camping and other forms of eco-tourism. Health tourism, on account of the cool climate of most regions of the country and the numerous hot springs in many volcanic areas, is an additional type of tourism with great potential.

Conference tourism, long aided by the presence of a number of international organizations in Addis Ababa including the headquarters of the Organization for African Unity and the Economic Commission for Africa (ECA), is poised to gain greater significance as a consequence of the newly built ultra-modern facilities at the ECA and the Sheraton Addis.

h) Challenges of Ethiopian tourism

Observably in most developed countries, the smokeless industry has the lion's share in the overall economic growth and development of a country. The tourism sector has now become a major source of income for various stakeholders engaged in the sector. In this regard, despite Ethiopia's endowment with various natural and manmade heritages, it had not benefited much from the sector for years due to various factors. Currently, Ethiopia's tourism sector is booming in line with its fast economic growth. It is also basking under stable peace and security as compared with other African countries. And that is why Ethiopia enjoyed the limelight as this year's 'Top Destination In The World For Tourists' by the European Council on Tourism and Trade (ECTT) because of excellent preservation of humanity landmarks. However, in the eyes of actors in the service sector and lessons got during the course of the last five years, this sector has its own prospects and challenges.

Under the coverage of community benefits, the sector suffers from unreasonable interference in most tourist destination areas by the local hotels, tour guides and the like. As compared to other African countries, travelling to tourist destinations proves a very costly adventure discouraging tourists from coming to Ethiopia. In some places, local residents want to sponge on tourists. Hence, the government, especially the Ministry of Culture and Tourism, should seriously take the responsibility of creating awareness among the community. Moreover, the number of graduates is increasing both from public and private institutions, there is still a shortage of skilled and capable human power. Thus, the Ministry needs to offer ultra-modern training to professionals and practical policy.

VI. SUMMARY

A Tourism Development Policy has been implemented a year ago with a view to help in harnessing the untapped tourism potentials in the country. The tourism policy, harmonized in to other policies and strategies of Ethiopia's economy, has helped to improve the performance of travel and tourism sector. National air carrier for major network expansion, Conference tourism due to the presence of many

international organizations such as AU and UNECA, a rise in domestic and foreign private investment in hotels and a rise in development of travel and tourism due to growing international demand and the country's effort aimed at providing better ecotourism has also contributed positively to the expansion of ecotourism in the country. Partners' support also had its immense contribution.

Currently the Government is redesigning rigorously the tourism industry with a view to make it environmentally conscious, and go beyond the unfortunate goal of conventional tourism which was focusing on mere financial benefits but little or no regard for environmental degradation of tourist sites.

A new tourism and culture development policy is under discussion by all stakeholders and will shortly be implemented. The newly amended policy understands that global tourism grows at the average annual rate of 4.3%, the tourist industry in Ethiopia still accounts for less than 2 percent of Gross Domestic Product when compared to 6%, 14% and 5% of GDP for Egypt, Kenya and of South Africa respectively. Cognizant of this, the government is looking for wider ways to double tourism earnings during 2010-2015 and see about one million foreign arrivals by 2020. In order to realize this goal, it intends to intensify its campaigns abroad of introducing the country as a top business and leisure destination. It also plans to introduce the country's ecotourism opportunities to new tourism markets such as India, China, Russia and Brazil. Its objective is to create social and economic benefits through ecotourism and to foster the conservation of natural resources of the areas. Participatory local initiatives, in collaboration with partners, will also be encouraged in a more organized way with a view to develop and introduce a consolidated approach for Eco-tourism that can be replicated in other areas and that enhances the sustainable utilization of the natural resources. The government is aware of current trends that, to attract tourists, the ecotourism industry must be designed to incorporate and implement responsible, ethical, forward-looking, and far-reaching environmental oversight. It is working to balance the economic, social and environmental management pillars of sustainable development.

Tourism has increasingly become a favoured development tool in many developing countries for poverty alleviation. For instance in eastern Africa tourism has scored tremendous improvement with the presence of stability in the area like in Kenya, Ethiopia, Uganda etc. but still problems exist in Somalia. With the relative ease of entry into the tourism market and its purported ability to generate foreign exchange and create employment, it is no wonder that it is being pursued. However, like any development option or avenue of economic endeavor, it comes with a cost. This, then, is at the heart of the tourism development dilemma. Tourism represents an attractive, and perhaps

the only, means of stimulating economic and social development for some developing nations.

However, frequently that development either fails to materialize, benefits only the local élite or multinational corporations, or is achieved with a very high social, environmental or economic cost. In the developing world, tourism is usually implemented through a top-down planning approach, and decision making is 'predominately based on the interventions of government agencies and large tourism firms, resulting in the dominance of external, often foreign capital and the marginalisation of local people' (Liu and Wall 2006). Developing countries opting into the tourism industry will encounter both the positive and negative consequences of this globally competitive industry, and the challenge lies in accepting or managing the negative consequences in the hopes of obtaining the potential long-term benefits of tourism. The complexities of using tourism as a development tool and the dilemma that many countries face in coping with the uncertainty that tourism brings have been.

Generally the tourism development process intersects with the economic, political, environmental and social conditions in the destination and is also framed by the global political economy. Despite the fact that tourist arrivals in Ethiopia is at an increasing mode because of policy measures, the sector in general is underperforming compares to neighboring destinations. Various domestic and international challenges are attributed to the low performance of the sector. Though the tourism development policy was designed well, the proper implementation of it is easier said than done. Lack of resources, weak coordination of institutions and failure of various stakeholders in playing their role are among the major causes for poor implementation.

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Business Confidence and International Tourism Demand: Evidence from a Global Panel of Experts

By Valeria Croce

Introduction- In 2003, the United Nations agency for tourism (UNWTO), established a Panel of Tourism Experts, to collect regular information on the short-term development of tourism. Experts' opinions are since used to estimate a confidence index, which offers fairly accurate information on the current and future development of the tourism sector worldwide and by macro-regions. The significance of this instrument became evident during the 2008/2009 economic and financial crisis, when indications about the impact and duration of the crisis were scarce, but particularly relevant to a sector having experience virtually uninterrupted growth until then. This piece of research intends to achieve a better understanding of confidence index's contribution to forecasting tourism demand. Results confirm the tourism confidence index as an effective method to improve the accuracy of forecasts.

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BUSINESS CONFIDENCE AND INTERNATIONAL TOURISM DEMAND: EVIDENCE FROM A GLOBAL PANEL OF EXPERTS

Strictly as per the compliance and regulations of:



Business Confidence and International Tourism Demand: Evidence from a Global Panel of Experts

Valeria Croce

I. INTRODUCTION

In 2003, the United Nations agency for tourism (UNWTO), established a Panel of Tourism Experts, to collect regular information on the short-term development of tourism. Experts' opinions are since used to estimate a confidence index, which offers fairly accurate information on the current and future development of the tourism sector worldwide and by macro-regions. The significance of this instrument became evident during the 2008/2009 economic and financial crisis, when indications about the impact and duration of the crisis were scarce, but particularly relevant to a sector having experienced virtually uninterrupted growth until then. This piece of research intends to achieve a better understanding of confidence index's contribution to forecasting tourism demand. Results confirm the tourism confidence index as an effective method to improve the accuracy of forecasts.

This piece of research intends to achieve a better understanding of confidence index's contribution to forecasting tourism demand. Following the approach proposed by Guizzardi and Stacchini (2015), this study assesses the predictive power of the UNWTO Tourism Confidence Index-possibly the world's most widely used and influential forecasts for the tourism sector- by factoring the index in structural time series models. Forecasts are produced for the global scale, for advanced and emerging economies and five geographic macro-regions. Models' performance is evaluated on in- and out-of-sample basis, and benchmarked against frequently used univariate models. The index is first considered as stand-alone forecasting tool, with analyses focusing on its correlation with series of actual values and assessing the accurateness of forecasts derived from the Index. A second part of the analysis focuses on the Index value as explanatory variable in model-based forecasts, testing its usefulness as predictor by factoring the index in structural time-series models. The predictive accuracy of augmented models is eventually tested against simpler versions of structural models and autoregressive models. Results show that information gathered through a simple and rather inexpensive tool

can be effective in improving the accurateness of short-term forecasts of tourism demand.

Managerial implications of research findings are manifold. As demonstrated by Guizzardi and Stacchini (2015), tourism confidence indexes offer the possibility to obtain timely estimates of current and near-future levels of tourism demand. They hence represent a cost-effective solution to compensate for the lag in official statistics publication. Previous research also proved that confidence indexes in general, and the UNWTO index in particular, have a good predictive power in identifying discrete turning points in the business cycle (Taylor and McNabb 2007, Croce 2016), and can actively contribute to strengthen the resilience of a sector vulnerable to changes in the external environment. The widespread use of the Internet and ICT developments further offer unprecedented opportunities to leverage collective intelligence from large groups of individuals for forecasting purposes (Segaran 2007), helping small businesses and budget-constrained destinations to embrace forecasting practices, replicating processes which proved fruitful in other sectors (Wolfers and Zitzewitz 2004).

Furthermore, the data environment related to the tourism sector is characterised by lengthy statistical processes causing a dominating backward-looking approach (Vanhove, 2005). The suboptimal availability of data, both in terms of scope and timeliness, coupled with a complex demand and supply, make a case for the use of confidence indexes in tourism, as they represent a cost effective methodology to forecast future changes in the development of the sector.

II. LITERATURE REVIEW

The view that confidence measures can predict fluctuations in economic series, such as the level of economic activity or consumer spending, is a popular one in the economic literature. In the tourism-related literature, instead, the use of confidence measures in forecasting is still a largely unexplored area (Swarbrooke and Horner 2001, Njegovan 2005, Yap and Allen 2011, Mihalic, Kester et al. 2013, Guizzardi and Stacchini 2015, Croce 2016).

The existing literature on tourism forecasting is by far dominated by quantitative approaches, and only a

limited number of studies emphasize the suitability of qualitative approaches to forecast tourism demand (for reviews, see Witt and Witt 1995, Goh 2004, Song and Li 2008, Goh and Law 2011, Peng, Song et al. 2014). In general, the use of subjective information in forecasting -inter alia sentiment measures- is justified whenever quantitative indicators are missing, or their provision is not sufficiently timely. Sentiment indexes are frequently considered as a valid source only when they compensate for the lack of "hard" information. In reality, these measures feature a number of properties that make them useful indicators even in presence of quantitative information, such as the capability to factor non-measurable variables in estimates, and to provide a synthetic value of the impact these factors would have on tourism development, and to provide near real-time forecasts (Guizzardi and Stacchini 2015).

The vast literature about forecasting provides clear directions about environment-specific conditions determining which approach is the most suitable for a forecasting task. Wherever routine decisions are involved, the assumption of continuity is realistic and sufficient quantitative information is available, the most complex quantitative methods provide more accurate predictions than the simpler statistical methods (Makridakis, Wheelwright et al. 1998, Armstrong and Fildes 2006). In areas such as physics and engineering, for instance, the accuracy of causal and statistical forecasting models has achieved remarkable results in providing almost error free predictions (Makridakis and Taleb 2009). Whenever the conditions of the above-mentioned requirements are non-optimal, a combination of statistical methods and judgement proved to produce a more accurate forecast than each approach used separately (Goodwin 2002, Fildes, Goodwin et al. 2006, Fildes, Goodwin et al. 2009).

The kaleidoscopic and human-based nature of tourism poses serious threats to regular data collection and to the correct specifications of exogenous variables required by econometric models. Confidence indicators may offer a way out of this trade-off, as they incorporate in a single value the impact of many predictors, including 'those economic and market phenomena that are known but not quantified' (Caniato, Kalchschmidt et al. 2011).

The use of confidence indicators in forecasting is very popular in the general economic literature, but it is still a rather unexplored research area in tourism. Swarbrooke and Horner (2001) first introduced this approach in the tourism literature, using business travellers' expectations about a foreign country's economic development to forecast business travel flows. Njegovan (2005) used a probit model to examine whether leading indicators could be used for the purpose of predicting short-term shifts in demand for business travel by air, to and from the UK. The estimated probit model provided timely predictions of

industry recessions and it was overall more accurate than benchmark models. Allen and Yap (2011) examined whether a consumer confidence index could help predicting Australian domestic tourism demand. Their findings suggest that the index has significant impacts in forecasting VFR, but not other forms of tourism. Guizzardi and Stacchini (2015) provide evidence that information retrieved from business surveys is effective in improving real-time forecasting of hotel arrival to regional level. Croce (2016) found that prospects of UNWTO Panel of Tourism Experts can provide meaningful indications about the future sign of international tourism demand growth, and that they can significantly contribute to improve forecasting accuracy under specific circumstances.

This study intends to escalate the approach proposed by Guizzardi and Stacchini (2015) to the global and macro-regional level, using data provided by the UN agency for tourism, UNWTO. Following their design, Tourism Confidence Index prospects are factored in structural time series models and compared with forecasts produced by the same models, without the index. Forecasts are produced for the total number of international tourist arrivals, as well as for international arrivals to advanced and emerging economies and to five geographic macro-regions (see Figure 1). Models' performance is evaluated on in- and out-of-sample basis, and benchmarked against a baseline ARIMA model.

The choice of quantitative models is grounded in evidence Peng, Song et al. (2014) provide in their latest attempt to generalise models' performance in forecasting tourism demand. Based on empirical findings of by-then published studies, their review confirms ARIMA processes as the most frequently used time-series approach, but also highlights the advantages of structural time series models, when exogenous variables can be included (Gonzalez and Moral 1995, Kulendran and King 1997, Kulendran and Witt 2001, Turner and Witt 2001). Structural time series models are based on the traditional decomposition of time series into trend, seasonal and cycle components (Harvey 1990). This characteristic is expected to well capture evolutions of tourism demand, especially in those macro-regions characterised by regular variations in their growth patterns. The strong correlation of index values with international tourist arrivals, and the good fit of regression models including the confidence index as predictor (Croce 2016), are also convincing about the positive contribution of the index in improving forecasts.

III. DATA CHARACTERISTICS

In this piece of research, UNWTO Tourism Confidence Index is used as input in regressive forecast models. International tourist arrivals (ITA) are selected as dependent variables, and reflect the cross-border

flow of people for tourism purposes. The following section describes the data used and illustrates those properties of time series, which are a prerequisite for the selection of appropriate forecasting models.

a) *International tourism development from 2003 to 2015, key indicators*

Since the early 1990s, UNWTO secretariat has been collecting series of international tourist arrivals from destinations around the world, which are regularly published on the organisation's World Tourism Barometer. Despite methodological inconsistencies that characterize the production of tourism statistics, the information provided by the UN agency can be deemed as the most reliable dataset covering virtually all world destinations, not last due to a compensation effect that characterizes large aggregates, as the eight series (see Figure 1) here in exam.

Monthly growth rates in international tourist arrivals, compared to the same month in previous year, have been calculated and aggregated in 4-month periods, in order to create time series consistent with the period covered by confidence indexes. Each series consists of 38 observations, dating from 2003/2 to 2015/3 (see Figure 1). Of these, 26 observations have been used to estimate forecasting models' parameters for the first iteration, and the remaining 12 observations are devoted to out-of-sample accuracy tests (shadowed area in Figure 1).

During the period in exam, international tourism has enjoyed growth in all world regions. Overall, international tourist arrivals grew on average by 4,5% each year, with typically regular variations around the long-term trend (Standard Deviation(SD) = 3.87). Large variations were caused by external shocks of relevant magnitude, such as the breakout of the SARS syndrome in 2003, and the 2008-2009 economic and financial crisis. In this period, emerging economies typically grew faster (Means(M) = 5.61; SD = 5.02) than advanced ones (M = 3.64; SD = 3.64), but these latter followed a more regular growth pattern, as indicated by a lower standard deviation. Mature destinations such as Europe (M = 3.37; SD = 3.46) and the Americas (M = 4.22; SD = 4.64) are characterised by a comparatively lower growth, largely explained by the already large volumes of international tourists attracted by these regions, and partly also by the distance from the most rapidly expanding outbound travel markets, as China. Large volumes are also an indication that these regions host many established destinations, which is reflected in regular growth patterns. Tourism demand for emerging destinations in Asia and the Pacific (M = 7.24; SD = 10.00), the Middle East (M = 6.73; SD = 12.51) and Africa (M = 5.11; SD = 5.12) grew at a faster pace, but also proved more volatile and vulnerable to external shocks. For all series bar the Middle East, international tourism demand seems to grow more regularly during

the out-of-sample period, although a pairwise test of means difference reveals no significant difference between the two sub-samples.

An augmented Dickey-Fuller test, performed on the in-sample subset of data, depicts all series as non-stationary processes, with a confidence level of 99%¹. First-order and second-order differencing returns stationary series with a type-I error probability lower than 1%. The aggregation in 4-month periods removes seasonality from arrival series, but a few series (Americas, Asia Pacific and Europe) seem to feature a cyclical component. Growth rates pattern in these macro-regions could be fit by a sinusoidal curve with cycles lasting approximately 3 years for Americas and Asia Pacific, and 6 to 7 years for Europe. Given the heavy weight destinations in Asia Pacific have in the emerging economies aggregate, this series seems also to be characterised by a cyclical component with cycles of 3 years.

¹ The ADF test depicts the series Americas, Asia Pacific and Middle East as stationary at a confidence level of 95%.



Figure 1: International tourist arrivals and Tourism Confidence Index prospects, 4-month data series, 2003/1 to 2015/3 (source: UNWTO).

b) UNWTO Tourism Confidence Index

Since 2003, UNWTO Secretariat has been collecting retrospective and prospective evaluations of tourism performance from hundreds of tourism stakeholders recruited through the organisation's global

network². Evaluations and prospects capture the development of tourism demand compared to what experts could reasonably expect for the period of

² Panel members are conveniently recruited by the UNWTO Secretariat based on their professional background, without any formal assessment of the candidate's expertise with the forecasting task.

reference. Changes are measured on a 5-step Likert (1932) interval scale, and collected by the means of an e-mail questionnaire. Experts are asked to motivate their assessment mentioning the main determinants that underlie the expected evolution of tourism demand. Waves are conducted three times a year and consist of a single round survey. Once a year, evaluations and prospects for the full year are also collected.

The Tourism Confidence Index (TCI) is constructed using the un-weighted net balance of survey responses collected through this survey, with 100 being the threshold value between contraction and expansion (see UNWTO 2016). In order to combine intra-year prospects and international tourist arrivals, index values have been homologised by the means of a linear transformation as in (1):

$$\bar{P}_t = \alpha + \beta P_t \quad (1)$$

where P is the index value at time t . Intercept α and slope β are estimated through a linear regression between the index and the equivalent series of international tourist arrivals to return estimated growth values (\bar{P}) at each time, hereafter referred to as homologised TCI values. Series of homologised TCI

values covering 4-month periods are used in the analysis that follows.

Since the second quarter of 2003, when the survey started, an average of 320 experts submit prospects and/or evaluations each wave. Such a large basis of participating experts allows breaking down the index into 18 different subsets, according to the level of economic development, the macro-region or the sector associated with the expert (see Table 1). For most subsets of data, the average number of experts participating in each round exceeds the threshold of 20 experts identified by Rowe and Wright (2001) as the optimal maximum number for Delphi surveys (the italic font in Table 1 denotes those subsets which don't meet this criterion). All subsets are also characterised by a relatively high deviation from the average index value, a positive factor in expert forecasting, where forecast accuracy tends to increase with diversity of inputs (Gordon and Helmer 1964, Woundenberg 1991, Williams and Webb 1994, Gupta and Clarke 1996, Rowe and Wright 1999). The average of all prospects collected throughout the past 13 years is reported as indicator of the level of optimism (or pessimism) that distinguishes each subset.

Table 1: Prospects of the UNWTO Panel of Tourism Experts (average value and standard deviation), average number of participants per round, and relationship with the correspondent series of international tourist arrivals (R^2 and Granger test).

	Prospects (4 month)		Experts / round	Diagnostics [*]			
	Average	StDev		R^2	Granger test (F)	DF	MAE
Total	120	42	282	0.59	14,897***	-2	1.65
State of economic development							
Advanced	113	39	153	0.51	8,974**	-2	1.77
Emerging	128	42	129	0.64	3,312	-2	1.95
Macro-region							
Africa	129	43	20	0.27	0.846	-1	3.47
Americas	125	42	73	0.59	7,208**	-2	2.19
Asia and the Pacific	126	44	38	0.32	4,425*	-2	4.53
Europe	115	38	122	0.51	6,925**	-2	1.83
Middle East	125	42	14	0.26	0.553	-1	8.88
Type of sector							
Public	125	40	119	0.53	5,188*	-2	1.70
Private	117	42	163	0.62	16,580***	-2	1.75
Sector							
Consultancy, Research & Media	118	40	88	0.46	15,726***	-2	1.86
Destinations (national)	126	40	75	0.64	2,254	-2	1.58
General Industry Bodies & Other	119	40	43	0.46	6,388**	-2	1.83
Accommodation & Catering	115	42	29	0.39	5,722*	-1	2.25
Tour Operators & Travel Agencies	117	43	29	0.48	1,094	-2	1.87
Destinations (regional & local)	121	37	23	0.39	7,553**	-2	2.25
Global Operators	109	39	15	0.35	7,166**	-2	2.13
Transport	121	45	12	0.28	1,635	-2	2.20
Business & meetings (MICE)	123	40	7	0.39	4,236*	-2	2.05

*: Diagnostics are related to the total number of ITA for sector subsets, and the correspondent series of ITA for all other subsets

*: Significant at $p < 0.05$; ***: significant at $p < 0.001$

When considered as independent forecasting tool, prospects of the UNWTO Tourism Confidence Index show a good fit with correspondent series of international tourist arrivals, as synthesised by R^2 values

in Table 1. Differences among subsets are largely explained by panel size, as the average number of experts participating in the survey varies greatly across series and is strongly, and positively, correlated with R^2

values ($\rho = 0.72$). Expectedly, R^2 values are also inversely related to the accurateness of forecasts based on homologised prospects ($\rho = -0.60$). Series with an R^2 of at least 0.50 are associated with a Mean Absolute Error (MAE) of 1.8 percentage points on average, which goes up to 3.0 percentage points for series with a lower R^2 value. Expectedly, the index fits regular series better than volatile ones.

This study argues that prospects can also be a valuable predictor of future tourism demand development, and they can significantly improve the accurateness of univariate forecasting models. On average, there is a positive elasticity between the index and international tourist arrivals growth. Based on (2), one percentage point change in arrivals growth corresponds to a change between 4 and 6 points in the index value. These values remain rather consistent for periods of positive and negative growth, and across geographical aggregates.

$$E_{ITA,t} = (I_t - 100) / [(ITA_t - ITA_{t-1}) / ITA_t] \times 100 \quad (2)$$

A Granger (1969) causality test has also been performed on series of prospects and correspondent series of arrivals, to test the null hypothesis that prospects are exogenous with respect to international tourist arrivals. If the hypothesis is rejected, it is likely that including past values of prospects in the forecasting model would provide statistically more information than past values of arrivals alone. Granger test values are also used to select those sub-sets of prospects (by the sector experts work for), which can be useful in predicting values of international tourist arrivals at total level. Only those series with a significant level of Granger-causality will be included in the analyses that follow. The test has been performed using the 'granger test' function available in 'lmtest' package R, the free software environment for statistical computing and graphics. This function compares the unrestricted model - in which the dependent variable (y) is explained by the lags (up to the specified order) of y and of the independent variable (x) -, and the restricted model - in which y is only explained by the lags of y - by the means of a simple Wald test³. Results are reported in Table 1.

In general, the test confirms prospects as a predictor that can significantly improve international tourist arrivals forecasts (the test is significant for 13 out of 19 series). The null hypothesis that the lagged series (lag = 2) of total prospects, as well as prospects provided by the Private Sector and Consultancy and Media experts, would not be useful in predicting total international tourist arrivals' growth rates, can be rejected with a Type-I error probability of 1%. The same

hypothesis can be rejected for the lagged version (lag = 2) of prospects provided by General Industry Bodies & Other, Local and Regional Destinations and Global Operators, although with an error probability of 5%. Looking at aggregates by level of economic development and macro-regions, lagged series of prospects (lag = 2) can be considered Granger-causing the correspondent series of international tourist arrivals in Advanced economies, Americas and Europe, with a 95% confidence level.

It is appropriate to mention, that aggregates by level of economic development and regional series are marked by a higher conceptual correspondence between series of actual values and series of prospects, than aggregates by sector. While international tourist arrivals measure inbound flows to the country of destination, the survey asks experts to estimate future developments in the tourism sector in their region and/or the business sector they operate in. Prospects hence return estimates, which are not only conceptually broader than just the international demand component, but which may also be strongly biased by local patterns, when provided by experts operating in local businesses. Unsurprisingly, the stronger Granger-causality is observed in groups of experts operating in global businesses. As such a discrepancy is lower for aggregates by economic development and macro-region, all seven aggregates will be included in the forecasting exercise described below (bold font in Table 1).

IV. FORECASTING MODELS

The assessment of UNWTO Tourism Confidence Index contribution to improve forecast accuracy is based on a comparison of forecasts obtained with structural time series models, in which the index is factored, and structural models without the index as predictor. Forecasts based on simple auto-regressive models are also computed, as baseline forecasts, as these models frequently outperformed more complex models in previous forecasting competitions (Li, Song et al. 2005, Athanasopoulos, Hyndman et al. 2011, Peng, Song et al. 2014, Akin 2015, Guizzardi and Stacchini 2015).

For each of the eight series in exam, forecasts have been obtained using packages in R. The 12 forecasts in the out-of-sample dataset allow for a robust test of significance in forecast accuracy between baseline and competing models.

a) *Baseline forecasts: auto-regressive moving-average models*

For each series, different ARIMA models have been estimated in order to select those who perform best in estimating one-step-ahead forecasts. The choice

³ It must be noted, that the original definition of Granger causality does not account for latent confounding effects and does not capture non-linear causal relationships.

of models was updated each time a new observation was added, as in a real-life situation, where data arrive sequentially and in-sample dataset is updated accordingly, as new data become available. This process was routinised by the use of the 'auto.arima' function available in R "forecast" package. The function uses a variation of the Hyndman and Khandakar algorithm, which performs repeated KPSS tests to set the order of differencing (d), a stepwise search based on AICc values to set the number of auto-regressive terms (p) and lagged forecast errors (q), and maximum likelihood estimation (MLE) to identify the best fitting ARIMA model⁴. Model parameters and diagnostics are reported in Table 2.

In general, ARIMA forecasts show a low out-of-sample fit (R^2) with series of actual values, which is

reflected in mean absolute error (MAE) values exceeding one percentage point (p.p.) for virtually all series. The only exception is the moving average model of order one, used to forecast international tourist arrivals to Africa, with an R^2 value of 0.77. This is reflected in comparatively accurate forecasts (MAE = 1.86), given the highly varying pattern that characterises this series. As predictable, ARIMA models perform best with regular series. The auto regressive model of order two, applied to total growth in international arrivals, stands out as the best performing model, with an average error and standard deviation both below the one percentage point threshold.

Table 2: ARIMA models, parameters estimates and accuracy measures by macro-regions.

ARIMA - one-step-ahead forecasts								
	World	Africa	Americas	Asia Pacific	Europe	Middle East	Advanced ec.	Emerging ec.
Model ^o	(2,0,0)	(0,0,1)	(1,0,0)	(0,0,2)	(1,0,0)	(0,0,0)	(2,0,0)	(0,0,2)
ar1	1.07	-	0.71	-	0.82	-	1.13	-
ar2	-0.53	-	-	-	-	-	-0.50	-
ma1	-	0.39	-	0.88	-	-	-	0.97
ma2	-	-	-	0.64	-	-	-	0.54
intercept	4.20	6.79	-	-	-	8.89	2.82	5.98
Out-of-sample								
R^2	0.03	0.77	0.32	0.12	0.04	0.07	0.00	0.15
MAE	0.60	1.86	1.80	1.16	1.05	0.70	1.58	1.47
stdev MAE	0.58	1.70	1.50	1.18	0.78	0.70	0.83	1.02
MAPE	13%	121%	34%	18%	27%	475%	33%	35%

^o: all values refer to the ARIMA model fitting the first 26 observations (2003/1 to 2011/3).

b) Structural time series models

Structural time series models are a flexible approach for time series analysis. They can be considered as state-space models for time series, based on a decomposition of the series into their unobserved, latent components, namely trend, cycle and seasonality. These models are frequently used not only to provide a description of the salient features of time series, but also to forecast their future values (Holden, Peel et al. 1990). The characteristic of modelling time series components well suits to forecast the series in exam, as the cyclical component, observed in some of them does not appear explicitly in the definition and selection of ARIMA models.

For each of the eight series in exam, forecasts have been estimated for a one-year horizon (three periods). As for the baseline forecasts, the process has been replicated for all 12 periods of the out-of-sample data. Structural time series models were estimated using R 'stsm', 'dlm' and 'KFKSDS' packages. The 'stsm' package offers the opportunity to apply five

different models. Different models have been tested on each of the series, and the best performing model, in terms of in-sample MAE, has been retained for comparison with competing models.

The decomposition of each time series into its components generates small improvements in forecasts accuracy for five of the eight series in exam (Table 3). Accuracy gains are measured as percentage increments compared to corresponding baseline forecasts⁵. The magnitude of accuracy gains is rather limited, as it falls between a minimum of 15% and a maximum of 29% of the respective ARIMA Mean absolute error. Considerable accuracy gains are observed for series with large movements around the trend, such as Asia Pacific (accuracy gains of 24 p.p. compared to the MAE of baseline forecasts) and Middle East (gains of 15 p.p.), but also for series with stable growth patterns, such as the series advanced economies (29 p.p.) and total (17 p.p.). A common

⁵ The difference is calculated between the MAE of STS models and the MAE of ARIMA models, relative to this latter measure. A negative value indicates a lower MAE value for STS models.

⁴ For more information see: <https://www.otexts.org/fpp/8/7>.

characteristic of these series is the regularity of their behaviour, being they regular in their cyclical growth pattern⁶, or being they near-stationary series.

Table 3: Structural time series models, parameters estimates and accuracy measures by macro-regions.

	World	Africa	Americas	Asia Pacific	Europe	Middle East	Advanced ec.	Emerging ec.
Model	Llm+seas	Trend	BSM	Level	Llm+seas	Level	Llm+seas	BSM
Parameters coeff. ^o								
μ	13,15	2,92	21,39	125,67	9,04	9,52	8,91	23,82
ε	0,00	15,19	0,00	0,00	0,00	144,16	0,00	0,00
δ	-	-	0,00	-	-	-	-	-
ψ	-	-	-	-	-	-	-	0,00
ϕ	-	-	0,00	-	-	-	-	0,00
out-of-sample								
R ²	0,14	0,29	0,26	0,16	0,11	0,12	0,03	0,27
MAE	0,50	2,83	2,09	0,88	1,17	8,26	1,12	1,24
stdev MAE	0,25	1,62	1,00	0,86	0,82	6,10	0,64	0,84
MAPE	11%	183%	39%	14%	30%	405%	23%	30%
Gains % ARIMA	-17%	52%	17%	-24%	11%	-15%	-29%	-16%

^o: all values refer to the first iteration of the model with 26 observations.

*: Significant at $p < 0.05$; ***: significant at $p < 0.01$

Structural time series models tend to reduce the variance of absolute errors; hence they contribute to make predictions more robust. This improvement is particularly remarkable for the series Middle East, Americas, World and Asia Pacific. This is reflected in the improved fit between forecasts and actual values, as expressed by R² values. Compared to baseline forecasts, structural models return smoother cyclical fluctuations and a positive trend, which better fits the actual development of tourism in these regions. Minor improvements in R² can be indeed observed for all series, with the exception of Africa and Americas. A closer comparison of these two approaches reveals that structural time series models are more effective in capturing turning points, while moving average and auto-regressive models more nicely match the pace of growth before and after these points (see Figure 2).

c) *Augmented structural time series models*

Homologised values of Tourism Confidence Index prospects (see section 3.b) were eventually factored in the structural models used in the previous analysis. Both original series of homologised prospects and lagged versions thereof have been added to the models, for a comparison of the best performing models. Seasonally differenced series (lag = 3) of homologised prospects stand out as the regressors,

which provide the most valuable inputs to compound forecasts across all series. The only exception is the series emerging economies, for which original series of homologised prospects have been used. Parameter estimates and accuracy measures are reported in Table 4.

⁶ Based on the longer in-sample dataset, tourist arrivals growth to the Middle East are not characterised by a cyclical component, but the 12 observations in the out-of-sample data a sinusoidal type of pattern.

Table 4: Augmented structural time series models, parameters estimates and accuracy measures by macro-regions.

	World	Africa	Americas	Asia Pacific	Europe	Middle East	Advanced ec.	Emerging ec.
Model	Llm + seas ¹	Trend ¹	BSM ²	Level ²	Llm + seas ¹	Level ²	Llm + seas ¹	BSM ¹
Parameters^o								
σ^2_{ϵ}	0,14	15,09	2,62	1,79	1,83	105,14	0,29	0,38
σ^2_{η}	2,95	-	8,46	11,31	3,85	10,94	3,18	5,20
σ^2_{ω}	-	0,01	-	-	-	-	-	0,03
x reg	0,70	0,47	0,25	0,20	0,52	0,29	0,69	0,56
out-of-sample								
R ²	0,01	0,77	0,50	0,23	0,11	0,46	0,02	0,03
MAE	0,46	2,03*	1,38*	0,71	0,77	6,20*	1,13	2,01
stdev MAE	0,36	1,33	1,14	0,71	0,00	4,96	0,56	1,38
MAPE	0,03	0,14	0,10	0,05	0,05	0,44	0,08	0,14
Gains % ARIMA	-23%	9%	-23%	-39%	-27%	-36%	-29%	37%
Gains % STS	-7%	-28%	-34%	-19%	-35%	-25%	1%	62%

^o: all values refer to the first iteration of the model with 23 observations (strating 2004, 2).

¹: first order 1; 2: second-order differencing.

*: DM test significant at $p < 0.05$; **: significant at $p < 0.01$.

Accuracy gains brought by the use of the Index, if any, are first assessed in terms of percentage increments compared to the corresponding non-augmented version and baseline forecasts. The augmented version of structural time series models returns more accurate forecasts than the corresponding benchmarks for all series, with the exception of the two aggregates by stage of economic development. For advanced economies, the use of the index doesn't bring any substantial change in forecast accuracy, although the Granger test (performed on the subset of data) pointed to a possible contribution. This is likely explained by the uncertainty that lingered among tourism experts during the period 2012/2 until 2014/2, especially those in Europe – where most advanced economies are- Crises of various natures, primarily the European debt crisis, the risk of Grexit and the Crimea crisis, dragged experts' prospects down. In fact, tourism demand proved to be more resilient than experts expected and negative factors were more than offset by the rebound of important outbound travel markets, aggressive price policies as well as a favorable economic environment and plummeting oil prices. When applied to emerging economies, the Index instead slightly deteriorates the quality of forecasts (0.77 p.p. less accurate). This can be explained by the diversity in tourism development that can be observed within emerging economies worldwide.

For all other aggregates, accuracy gains brought by the Index range between negligible values (e.g. for the series total the MAE is only 7%, or 0.03 p.p., below the non-augmented version) to a maximum of one-third of the benchmark forecast error (or -2.1 p.p.

for the Middle East, and -0.7 p.p. for Americas). Data plotted in Figure 1 provide explanation for these differences. In general, information contained in the index helps improving turning points and smoothening the amplitude of cyclical variations. While the non-augmented version models, more or less efficiently, regular variations in time series, the index introduces those changes that enhance the match with observed values. This confirms Guizzardi and Stacchini's (2015: 219) conclusions that a confidence index can be usefully exploited to explain deviations from trend-cycle, due to short-term shocks. This is symptomatic of experts' capability to infer behaviour from the past, but also factor current inputs in their estimates, and deliver a realistic version of future tourism developments. The use of the Index further reduces deviations from mean errors over the 12 out -of-sample observations.

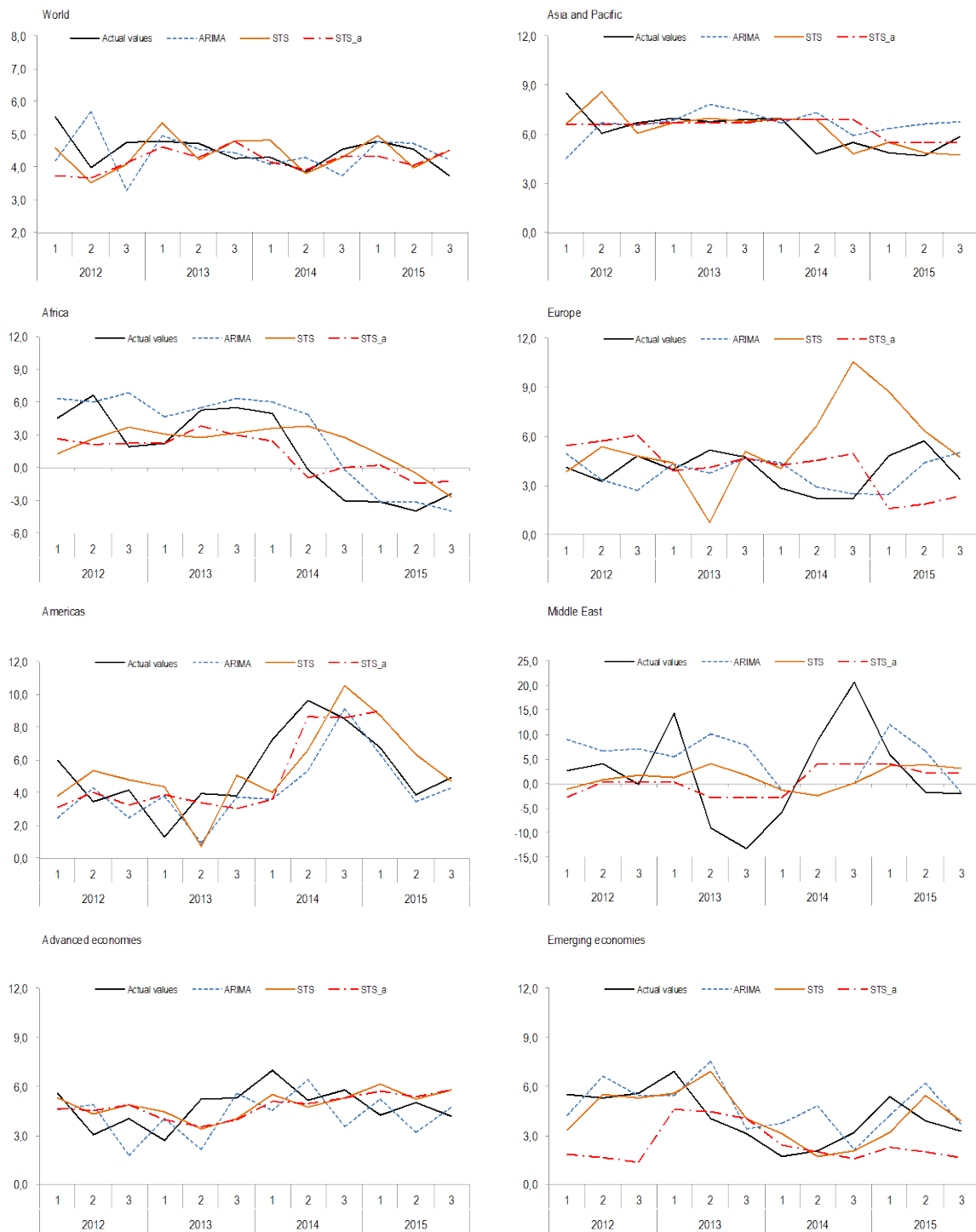


Figure 2: International tourist arrivals by region or economic development, actual values and forecasts, 4-month data series, 2012/1 to 2015/3 (source: UNWTO).



Figure 3: International tourist arrivals by sector, actual values and forecasts, 4-month data series, 2012/1 to 2015/3 (source: UNWTO).

The large size of UNWTO Expert group allows the analysis of different subsets of the index by sector. Prospects, provided by experts from five different tourism-related sectors, have been used as predictors of growth in international tourist arrivals worldwide. Parameter estimates and accuracy measures are reported in Table 5 and forecasts plotted in Figure 3.

The analysis doesn't point to professional experience in a specific sector as relevant to improve forecasts for the overall tourism sector.

Table 5: Augmented structural time series models, parameters estimates and accuracy measures by sector.

	Private sector	Consultancy, R+M	General ind.	Destinations (r+l)	Global operators
Model	Llm + seas ¹	Llm + seas ¹	Llm + seas ¹	Llm + seas ¹	Llm + seas ¹
Parameters*					
σ^2_e	0,16	0,72	-	-	-
σ^2_{ε}	3,30	3,23	4,65	5,88	5,30
σ^2_{ω}	-	-	-	-	-
x reg	0,72	0,67	0,49	0,46	0,62
out-of-sample					
R ²	0,01	0,02	0,02	0,02	0,02
MAE	0,50	0,47	0,50	0,50	0,50
stdev MAE	0,46	0,44	0,47	0,47	0,47
MAPE	11%	11%	11%	11%	11%

⁰: all values refer to the first iteration of the model with 23 observations (strating 2004, 2).

¹: order 1 differencing; 2: order 2 differencing.

V. COMPARING PREDICTIVE ACCURACY

Accuracy gains are eventually tested on out-of-sample values using the Diebold-Mariano (1995)⁷ statistics computed on out-of-sample absolute errors. The use of this test is a standard practice to compare the predictive accuracy of independent forecasts, and is particularly suited to compare the accuracy of model-free forecasts, as for instance survey-based forecasts. Furthermore, the Diebold-Mariano test accommodates for a number of series characteristics, among which the presence of serially correlated forecast errors (see Diebold & Mariano, 1995: 10). When used with short forecast horizons, as it is the case here, forecast errors correlation can lead to particularly conservative results of the DM test, with the null hypothesis being rejected too often. This may explain the limited number of statistically significant results, and encourages the interpretation of significant errors as solid recommendations about the validity of the correspondent forecasting approach.

The predictive accuracy of augmented models is reported in Table 4. The test suggests that the use of the index returns significantly more accurate forecasts for three series, namely Africa, Americas and Middle East. This is a noteworthy result from an operational viewpoint, as forecasts for series with very high variations, such as Africa and Middle East, are frequently exposed to large errors. Differences in forecast accuracy between the simpler version of structural models and ARIMA models appear not to be significant, based on the Diebold-Mariano test. STS models for the series Middle East and advanced economies, augmented with the index, become

statistically more accurate than their ARIMA counterpart, with a type-I error probability of 5%.

For all other series, results are encouraging, but not significant from a statistical viewpoint. In particular, the use of the index from different sectors as predictor in STS methods seems to reduce the predictive power of models. This is explained by the conceptual discrepancy between the prospects and actual series. While international tourist arrivals measure inbound travel flows, UNWTO prospects capture changes in the overall tourism sector, including domestic demand. The related index returns a measurement of the overall business climate rather than just its demand component, which may partly explain the lack of significant results for some of the series.

Another caveat, strictly intertwined with this aspect, is that international tourism demand is typically proxied by visitor arrivals, or overnights, at a destination. In spite of a remarkable progress, statistics on international flows are still largely not comparable as based on a host of different methodologies, hence falling short of the rigorous international comparability that would be required. Depending on the methodology, international tourist arrivals may be close to the official definition of a visitor, namely a person, who travels to a place outside her usual environment for personal or business/professional purposes, or may just monitor a subset of it, as for instance visitors staying at hotels and similar establishments. This lack of homogeneity is also believed to introduce a bias in results.

Another caveat stems from the use of a nominal group technique approach to collect prospects. This approach, appreciable for its simplicity, overlooks some of the techniques introduced to limit bias. Among them, it is worth mentioning the lack of multiple rounds, neglecting experts the opportunity to retrace their evaluation process based on group feedback, and the lack of feedback on their performance, which further limits their chances to learn from past experiences.

⁷ The DM test has been chosen as measure of significance due to the non-zero mean and serially correlated nature of forecast error series. Empirical applications of the test suggest that on small samples the test can have the wrong size and reject the null hypothesis too often. For this purpose, confidence levels start at 0.1.

VI. CONCLUSIONS

For the varied nature of its demand, and the composite nature of supply, the analysis of tourism requires a complex system of indicators (Candela and Figini 2012), for which structured and comparable data are seldom available. Monitoring such a complex system of determinants is difficult and expensive (Vanhove 2011), and it is often not a priority of the many governments, who don't consider tourism a strategic asset for their economies. The tourism sector is therefore one of those domains, where the use of qualitative forecasts is most promising, (Vanhove 2011).

The general forecasting literature provides evidence that qualitative forecasting methods are particularly valuable in generating accurate indications on the future values of phenomena, which are otherwise impossible or difficult to measure (Helmer and Rescher 1959). Among these methods, confidence surveys are a convenient and simple method to implement, and can effectively contribute to provide fairly accurate estimates of key statistical indicators. Internet and ICT developments further offer unprecedented opportunities to spread the use of this technique, and involve large numbers of individuals in collaborative tasks at reasonable costs (Segaran 2007), which is already a popular approach in finance (see for instance Wolfers and Zitzewitz 2004).

The analysis presented in this report adds strong evidence of the informative power of confidence surveys in producing short-term forecasts of tourism demand, across different tourism regions. The confidence index proves particularly efficient to improve forecast accuracy for destinations, whose irregular growth patterns can be hardly fit by purely statistical models. The index also contributes to increase the accuracy of forecasts for destinations with stable growth patterns. The use of the index also contributes to reduce error variance, thus making the outcome of forecasting exercises more robust.

These results have important managerial implications. The main challenges faced by tourism analysts and forecasters stem from problems related to data availability, such as the incidence of missing information, the lack of consistent data series, the need of a rather complex set of indicators explaining tourists' behaviour (Frechtling 2001). Volatility of demand, and the sensitivity of demand to external events such as war, terrorism and catastrophes, further complicates the matter and limits the performance of quantitative methods commonly used in other sectors of the economy. Due to the lack of adequate information to model and forecast tourism demand, the proposed approach certainly proves a convenient alternative to fill this gap.

The tourism confidence index is here confirmed as an effective method to obtain reasonably accurate

forecasts. A simple method, bearing limited costs for organisations, the use of confidence indexes in the tourism sector should be strongly supported. A broader use of this approach indeed would not only lead to a substantial improvement of insights intelligence available to policy makers and private operators, at any level, but it would also lead to a higher acceptance of forecasts and strategic analysis by practitioners, and encourage the adoption of forward looking attitudes in atypical backward-looking sector.

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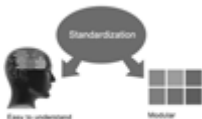
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Abstract:

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- Fundamental goal
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Approach:

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Approach:

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Approach:

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- Resources and methods are not a set of information.
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The page length of this segment is set by the sum and types of data to be reported. Carry on to be to the point, by means of statistics and tables, if suitable, to present consequences most efficiently. You must obviously differentiate material that would usually be incorporated in a study editorial from any unprocessed data or additional appendix matter that would not be available. In fact, such matter should not be submitted at all except requested by the instructor.



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Approach:

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