



An Analysis of the Tourism Marketing Performance and Strategy of Ethiopia

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Abstract

Tourism is one of the fast-growing industries in the world and has been considered as the main driver of world trade and prosperity. According to the UNWTO (2016), it contributes 10% of global GDP (US\$ 7 trillion), 5% of world exports (US\$1.5 trillion) and one in 11 jobs worldwide. Ethiopia, the origin of humankind and the only un-colonized country in the continent of Africa, tops the list in the region having 12 UNESCO inscribed world heritage sites. However, the performance of the tourism sector in the country is very poor, and in terms of travel and tourism competitiveness, Ethiopia is ranked 118th out of 141 countries in 2015 (WB, 2012; MoCT, 2015 & WEF, 2015). Cognizant of several reasons for this imbalance, the premise of this research was focused on a pre-assumption that either the tourism marketing strategy has been inappropriately formulated and implemented or even overlooked. A descriptive study was conducted to evaluate the performance of the tourism marketing practices of the government of Ethiopia. The tourism marketing strategy for Ethiopia (2016-2020) was critically reviewed and both strengths and weaknesses of the strategic document were identified. The study has revealed that the performance of tourism marketing practice is low (below regional average in most indicators), although the country has a good market growth rate. Notwithstanding a few pitfalls, the analysis showed that the existing tourism marketing strategy of the country was successfully formulated. It has been suggested that the government can concentrate more on the materialization of weak positions and modify the existing strategic documents accordingly so that the tourism marketing performance can improve.

Keywords: Tourism, Tourism Marketing Strategy, Key performance indicators, Ethiopia

Introduction

Ethiopia, located in the horn of Africa, is the only African nation which has never been colonized. The country has glorious tourist attractions and it is the first in Africa having twelve world heritages inscribed by United Nations Educational, Scientific and Cultural organization [UNESCO] (Ministry of Culture & Tourism, (hereafter, MoCT, 2015 & <http://www.deepethiopian.com/retrived> May 2015). There are archeological, cultural, historical and natural grounds that make Ethiopia unique. Paleontological studies identify Ethiopia as the cradle of humankind (McDougall et al, 2004; profit, 2007; Frost & Shanka, 2008; Central Statistical Agency [CSA], 2011 & Niall, 2012).



The country has four biosphere reserves and twelve literary and archival heritages registered by UNESCO. Ethiopia is the birthplace of coffee, the source of Blue Nile, the home of many ancient monasteries and diverse African traditional societies. The country has a unique cultural heritage, being the home of the Ethiopian Orthodox Church, one of the oldest Christian Churches (Niall, 2012) having being started by the Greek Orthodox Patriarchate of Alexandria and All Africa. The Ethiopian Church was thus administratively part of the Coptic Orthodox Church of Alexandria which was under Greek Orthodox jurisdiction, from the first half of the 4th century until 1959, when it was granted its own Patriarch by the Coptic Orthodox Pope of Alexandria and Patriarch of All Africa, Cyril VI. (See: <http://www.ibtimes.com/ethiopia-first-christian-nation-1110400>)

Ethiopia is the land of extremes from Danakil depression (the lowest point in the country which is 125 meters below sea level) to Ras Dejen, the highest mountain of the country, which is 4,550 meters above sea level. Furthermore, Ethiopia is one of the founding members of the UN, the Organization of African Unity, the diplomatic capital of Africa and also the headquarters of several regional organizations including the African Union (AU) and the United Nations Economic commission for Africa (UNECA) (Ethiopian Tourism Organization [ETO], 2015).

In spite of the above mentioned wonderful attractions, Ethiopia has no good regional and global rank (World Bank [WB], 2012). In terms of overall tourism & travel competitiveness, in 2015, Ethiopia is 17th in the African continent and 118th in the world (WEF, 2015). Consequently, the market share of Ethiopia is insignificant, less than 2% in 2011 (WB, 2012 and Industrial Development Corporation [IDC], 2013). Similarly, UNECA (2011) and Sisay, (2013) found that in 2011, the sector's direct contribution to GDP and employment opportunity was 1 to 2% respectively.

Past studies have shown the various problems which were attributed to the low performance of the tourism sector in the country. Accordingly, four major factors emerged namely: political and legal factors (Mann, 2006; MoCT, 2009 & WEF, 2013), the country's earlier negative image (MoCT, 2009; Getu, 2010 & WB, 2012), socio economic factors and competitive forces (Sisay, 2013) and these were identified as critical factors.

Considering the aforementioned four major reasons/factors, the researcher assumes that the prevalence of the imbalance between tourism potential and recipients from the sector is due to a relatively unsuccessful marketing strategy. In other words, the premise of this research is either tourism marketing is overlooked, poorly designed and/or ineffectively executed. To the best understanding of the researchers, very few studies have been carried out on eco-tourism and challenges and prospects of tourism industry in Ethiopia. Since the tourism marketing strategy of government of Ethiopia (hereafter, GOE) was firstly incorporated in 2015, there has been no reviews conducted to evaluate the tourism marketing strategy of the country. This study was thus designed to uncover the performance of tourism industry in Ethiopia and to critically examine the tourism marketing strategy of the country.

Global Tourism at Glance

Nowadays, tourism has become one of the most important and fastest growing industries in the world particularly, in the developing countries. According to the United Nations World Tourism Organization [UNWTO] (2016), international tourist arrivals have increased from 25 million globally in 1950 to 1186 million in 2015 and international tourism receipts earned by



destinations worldwide have surged from US\$ 2 billion in 1950 to US\$ 1260 billion in 2015. The World Travel & Tourism Council (WTTC) estimates that the travel and tourism (hereafter T&T) sector now accounts for 9.5% of global GDP, a total of US\$ 7 trillion, and 5.4% of world exports (WEF, 2015). UNWTO (2016) indicated that T &T industry continues to play a key role as a driver of growth and job creation, growing at 4% in 2014 and providing 266 million jobs, directly and indirectly. This means that, the industry now accounts for one in eleven jobs on the planet, a number that could even rise to one in ten jobs by 2022. This clearly shows us, how travel and tourism sector has continued to be a critical sector for economic development across the world.

Despite the sector's pivotal role in terms of its economic contribution, there has been a high degree of discrepancy between developed and developing nations. As far as the UNWTO Barometer Report (2016) is concerned, the developed world is taking the lion's share of the tourism market with Europe, North America and East Asia claiming 75 percent of the international tourists and the remaining share goes to America (16 %), Middle East (4 %) and Africa (5%).

Overview of Tourism Industry in Ethiopia

In the preceding pages, it has been discussed that Ethiopia is endowed with variety of cultural, historical and natural tourist attractions. According to the UNESCO World Heritage list, Ethiopia has the biggest number of world heritage sites in Africa. With a total of **12** (eight cultural, three intangible cultural heritage of humanity and one natural) heritage sites, the country tops the list. Ethiopia not only has the highest number of world heritage sites on the African continent, but one of the sites, the Rock-Hewn Churches of Lalibela, was one of the first sites that were chosen as a heritage site for the African continent at the list's conception. In 1978 the churches along with Senegal's Island of Goree, were the first to be put on the list (<http://www.deepethiopian.com/> retrieved 09 May 2015). In addition, Ethiopia also has four Biosphere reserves and twelve literary and archival heritages registered by UNESCO (ETO, 2015).

Despite the aforementioned magnificent tourist attraction sites that exist, the country's tourist market share within the continent is insignificant and accounted for less than two per cent in 2011 (WB, 2012 & IDC, 2013). For instance, the T & T competitiveness index indicated that, the country has no good regional and global position, whereby it ranked 17th in Africa and 118th in the world in 2015 (WEF, 2015). Despite the limited market share of the country, ETO (2015) claims that Ethiopia occupies 12th place in tourist arrivals and 10th place in tourist revenues.

To show how the tourism sector is underdeveloped in Ethiopia, the researcher made a comparison between Ethiopia with another East African tourist destination, the southern neighbor, Kenya. In 2013, Kenya attracted 1, 434, 000 foreign tourists (twice what Ethiopia achieved in 2015) and generated US\$1,844,000,000 while it was struggling with Al Shabab, Islamic militants group residing in Somalia. But, in the same time period, Ethiopia, a country which is considered to be a peaceful state on the Horn of Africa, was able to attract only 681, 248, 000 foreign tourists and generated US\$2.55 billion (Kenya National Bureau of Statistics, 2015 and MoCT, 2015). Paradoxically, Ethiopia (118th) has all the attributes of Kenya (77th) and even more. This indicates the extent of how much the tourism sector is in its infant stage in the country compared to some other African destinations such as Kenya, Tanzania, South Africa and Seychelles.



Numerous internal and external challenges have been attributed to the low performance of the tourism sector in the country. Some of the problems were identified and have been discussed in previous works. The **first** challenges were related to various political and legal factors which are ascribed to the low attention given to the tourism sector by the previous governments and the existing government. There are also unclear goals, policy and frameworks (WEF, 2013). Despite the recent initiatives and activities are being undertaken by the government, the sector was not given priority for a long time.

Politically, the civil war which was frequent in the northern part of the country is holding back needed resources and has damaged Ethiopia's image (MoCT, 2009 & Mann, 2006). The **second** factor was related to the country's earlier negative image. For many people around the world, mentioning Ethiopia brings the devastating 1984 famine to mind and conjures up images of poverty and deprivation.

According to MoCT (2009) and Getu (2010), despite the country's enormous resources, heritages and magnificent history, its recent depiction is suffering from the near-past images of drought, famine, war and poverty. Similarly, the WB Report (2012: 12) stated that, "*the country's negative image still exists and fast response to design and reflect its peculiar image through marketing strategy is required*".

The **Third** reason was related to the socio-economic factors, which includes deep rooted poverty, poor tourism infrastructure, inadequate number of hotels having tourist standard, poor ICT facilities, and lack of adequate and skilled manpower in the field that has adversely hampered the sector's growth (Teshale, 2010; IDC, 2012 and Sisay, 2013).

The **fourth** reason that negatively affects the sector's role is the competitive forces (strong competition) which are evident at both global and regional levels (Sisay, 2013). Although prior studies have found the aforementioned obstacles of the sector, the effectiveness of the tourism marketing strategy, which is one of the determinants of tourism success, is not yet clearly known.

The Nexus between Tourism and Marketing

Different scholars define the concept of marketing in different ways, according to their experience, background and knowledge. However, the most commonly quoted definitions were given by Kotler and American Marketing Association (AMA) and Chartered Institute of Marketing (CIM). Accordingly, Kotler (2008) defined marketing as the process of creating, communicating and delivering superior customer value to a target market at a profit. Similarly, as cited in the book of Kotler and Keller (2012), marketing is the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large (AMA). Similarly, the Chartered Institute of Marketing has defined marketing as the management process responsible for identifying, anticipating and satisfying customer requirements profitably (Wilson, 2003 as cited by Fyall & Garrod, 2010). It is apparent that, marketing is the life-blood of any business in general and tourism in particular and the tie between tourism and marketing is very strong. An integrated marketing strategy is the backbone to bring in successful tourism business, and is needed to gain the strategic competitive advantages from the wealth of tourism assets. In order to enhance the country image, attract more number of tourists towards destinations, track the satisfaction level and



loyalty status of attracted tourists and increase the revenue from the sector, an effective marketing strategy is very decisive.

Shirafkan and Masoumeh (2013) argued that due to inadequate marketing efforts, the contribution of tourism in the developing countries is less important than before. According to Africa House (2011), among other things, effective marketing is important to improve the competitiveness of destinations. Similarly, as cited in the book of Kozak and Andreu (2006), the importance of marketing was becoming widely recognized within the tourism industry and academics in the late 1980s (Middleton, 1988; Witt & Moutinho, 1989). As cited by Phukan et al., (2012), Papadopoulos (1989a) recommended that, in order for a national tourist organization to achieve its objectives and meet conditions in a rapidly changing environment, a well-coordinated tourism marketing planning process is essential.

Basically, there are some arguments on the number of tourism marketing pillars, which should be considered to bring best tourism marketing strategy. In product marketing, goods are often positioned in terms of the technical features and quality of the materials, packages, design and so on. Tourism and hospitality service offerings vary in this respect from many other forms of product or service offering. This is because of the role played of the extended services marketing mix elements in the positioning process. The marketing mix is originating from the single 'P' (price) of micro-economic theory (Chong, 2003, as cited by Goi, 2009). As cited by (Batra, 2006; Goeldner and Ritchie, 2006; Goi, 2009 and Pomeroy et al., 2009 & 2011), out of a large number of factors that could influence the development of marketing strategy, McCarthy (1960) extracted four elements namely, product, place, promotion and price, popularly known as the "4Ps of the marketing mix".

According to Middleton & Clarke (2001), the marketing mix for tourism services have been expanded in to 7 pillars by encompassing people, process and physical evidence in addition to the original four variables. Edgell (2002) for his part revealed that, the number of "Ps" in travel, tourism and hospitality marketing should be ten. These include product, price, place, promotion, partnership, packaging, programming, positioning, people and planning. According to Goeldner and Ritchie (2006), the marketing mix is composed of 12 factors including Timing, Brands, Packaging, Pricing, Channels of distribution, Product, Image, Advertising, Selling, Public Relations, Service Quality and Research. Halifax (2006) extended tourism marketing pillars into nine; by adding programming, partnership, packaging, positioning and people on top of the four traditional marketing pillars. Similarly, Kannan (2009) disclosed that the marketing mix for any service industry including tourism comprises of eight pillars. These include product, process, place and time, productivity and quality, promotion and education, people, price and other user costs, as well as physical evidence.

Performance measurement of tourism marketing strategy

Recently, marketing performance measurement has received considerable attention from both academics and practitioners. As cited by Mariussen (2011), marketing performance measurement is a recurring topic in the academic and practitioner communities (Kotler, 1977 and Ambler and Xiuxun, 2003). It is defined as a business process or a marketing decision support making system that assesses the outcomes of the marketing activities and their impact on business performance (Clarke et al., 2006; O'Sullivan and Abela, 2007, as cited by Mariussen, 2011). Kotler and Keller (2009) defined marketing metrics as the set of measures that helps marketers quantify, compare, and interpret marketing performance. Marketing



performance measurement plays a critical role in campaign management and resource allocation, and effective communication of the value of marketing.

Because of the variety and complexity of tourism products which depends on an extremely fragmented supply and the participation of many stakeholders, tourism marketing evaluation is more complex. On the other hand, Sterne (2003) argued that the key performance indicators for marketing vary according to specific areas of responsibility.

In Ethiopia, the area of tourism marketing, not to mention tourism marketing performance measurement, is under-researched, and there were no adequate studies conducted to reveal the performance of tourism industry using multiple key performance indicators (hereafter, KPIs). Thus, this study will help to narrow down the literature gap, with special emphasis on Ethiopia.

Research Design

The research design for this study is descriptive in nature. It aims to describe and analyze both the tourism performance and tourism marketing strategy of GOE.

Data Sources

This study is exclusively dependent on secondary data available in different forms and it is considered as secondary research, also known as desk research. Hence a brief review of literatures in the field has been presented. The two most important strategic documents; the national tourism development policy and tourism marketing strategy of GOE were critically examined. Furthermore, reports of MoCT, WEF, WB, UNWTO, WTTC and information from internet, newspapers and other sources were also analyzed and their major findings were used for comparison.

Method of analysis

The research consisted of the following three main stages. The first stage included a comprehensive review of the marketing performance literatures. The second step was aimed at the identification of current marketing performance metrics which is pertinent to tourism industry. Consequently, for the sake of tourism marketing evaluation, this research adopted TNS's (2012) key performance indicators (hereafter, KPIs). There are two major reasons for the proposition of the above specified metrics. Firstly, unlike other models, (Kotler & Keller 's marketing Metrics and Faulkner and Shaw's performance indicators), which are holistic to overall marketing performance, the proposed performance indicators are specific and appropriate to measure tourism marketing performance. Secondly, some of the constructs or factors identified in other alternative models were difficult to measure (K-N performance metrics). In the final stage, Ethiopia's current position in the tourism sector was compared with regional average across modified KPIs as shown in table 1.1.

Results and discussion

Before we proceed directly to the main discussion of performance of tourism marketing, it would be better to scrutinize the development of tourism industry in the country. As it was explained in



the brief literature section, nowadays, tourism has become one of the most important and fastest growing industries in the world, particularly in the developing countries realm. However, there has been a high degree of discrepancy between developed and developing nations and there is no exception for Ethiopia. Numerous challenges were attributed to the low performance of tourism sector in the country. Among other things, in Ethiopia, for a long period of time, there was no clear policies and strategies that would show the direction for the cooperation and coordination that should exist among various tourism stakeholders. As a result, it has not been possible for the country to obtain adequate returns from the sector, and the sector's growth has remained less coordinated and underdeveloped (ETO, 2015).

Although the industry is underdeveloped and the market share is insignificant, Ethiopia continues to demonstrate a steady rise in the number of visitors in the years under review, from 81, 581 in 1991 to 910,000 in 2015. The following table (Table 1.1) shows the most important landmark in the country's tourism development.

Table 1.1 Major milestones in Ethiopian Tourism Industry	
Period/year	Activity
1965	The first tourism plan was developed.
1974	The Derg regime came to power & the sector looks back- due to no entry & exit policy (closed door policy).
1991	Ethiopian people revolutionary party (EPRDF, the current ruling party) came to power and relative peace has been restored and the tourism starts to revive.
2009	National Tourism development policy was formulated and implemented.
2012	Two additional government organs were established to support the existing tourism offices. These are National Tourism Transformation Council (TTC) and Ethiopian Tourism Organization (ETO).
November 2015	<ul style="list-style-type: none">• Tourism marketing strategy for Ethiopia (2016-2020), which is the first in its kind, was formulated.• The old national positioning theme (which served for almost five decades) "Ethiopia, 13th month of sunshine" has been replaced by a new motto "Land of Origins".

Source: Recompiled (MoCT, 2009 & ETO, 2015)

Government institutions and stakeholders in Ethiopian tourism industry

It is apparent that different countries have established various institutions which are responsible to promote their respective tourism industry. Hence, there is no exception to Ethiopia and currently, the country has three tourism offices under the Federal Government and several bureaus at different government hierarchical levels. Accordingly, we see the following main government institutions, which include the Ministry of Culture and Tourism (MoCT), the National Tourism Transformation Council (NTTC), the Ethiopian Tourism Organization, regional tourism bureaus and a range of tourist information centers. Similarly, private actors in Ethiopian tourism sector consist of accommodation providers (hotels & lodges), transportation companies (airlines, car rentals, and travel and tourism businesses) as well as tour guides. Furthermore, it is noted that religious institutions, higher learning institutions, communities at destinations in all areas and thus the general public, are also considered as stakeholders in the tourism sector.



Relative Tourism Marketing Performance of Ethiopia

As it was explained above, despite the availability of numerous performance measurements for the travel and tourism industry (Faulkner and Shaw, [ND] and Kotler and Keller, 2009), the researchers adopted KNS's (2012) KPIs and further modified these metrics. Accordingly, of the nine in total recommended performance indicators only five KPIs are engaged. These are visitor satisfaction, market share, visitor spend and length of stay, arrivals and destination awareness, preference and image. Because of the insufficient data, four of the original KPIs; social media metrics, campaign exposure and evaluation, destination preference, number and success of partnership as well as ROI are not covered in the analysis. Few KPIs are replaced and additional performance measurement tools are incorporated and thus a total of thirteen marketing, customer centric and competitiveness metrics are employed.

With regard to the two fundamental marketing metrics, international tourist arrivals and international tourism receipts, the share of Ethiopia remains very weak in the region as indicated in table 4.2. Similarly, compared to the region, the total contribution of tourism to the country's GDP was found to be lower (US\$ 1.93 billion) than Africa's average (US\$4.2 billion). However, the growth in international tourist arrivals and average receipts per international tourist has been higher in Ethiopia than regional average. In relation to customer metrics (tourist satisfaction, loyalty, image) adequate data at regional level was not available and only the status of Ethiopia was presented.

In general, the performance of tourism industry in Ethiopia is characterized by low market competitiveness, insufficient tourist arrival and recipients but with high market growth rates.

Table 1.2 Relative tourism marketing performance in Ethiopia			
KPIs	Ethiopia's position	Regional average	Sources
Over all T & T competitiveness, 2015	17 th in the region & 118 th in the world	Out of 37 economies in the continent	WEF, 2015
Tourism's total contribution to GDP, 2014	~ US\$ 1.93 billion (4.2 % of its total GDP)	US\$4.2 billion	WEF,2015& WTTC, 2015
Travel & Tourism's total contribution to Employment, 2014	985, 500 jobs (3.8 % of total)	435, 800 jobs	WTTC, 2015 & WEF, 2015
International tourist arrival, 2015	910, 000 Tourists (1.7%)	53.5 Million tourists (4.5 of the world)	UNWTO, 2016
International tourism recipients, 2015	US\$ 394 Million (1.2%)	US\$ 33.1 billion (2.6% of the world)	UNWTO, 2016
Average recipients per int'l tourist	US\$900 (2013 est.)	US\$620 (2015 est.)	ETO, 2015 & UNWTO, 2016
Tourist arrival (growth rate), 2015	11%	6.0%	UNWTO, 2016 & ETO, 2015
Tourist's length of stay	~18.2 days	NA	Wassie & Dhaliwal (2017)
Tourist satisfaction	High (80%)	NA	Wassie & Dhaliwal (2017)
Tourist loyalty	Above average (63.6%)	NA	Wassie & Dhaliwal (2017)
Destination awareness	Very low	Low	WB , 2012
Destination image	Very poor	Poor	Getu, 2010 & WB , 2012
Relative price competitiveness	69 th in the world (medium)	NA	ETO, 2015 & WEF, 2015

Note: NA implies figure or data not (yet) available



Overall Evaluation of Tourism Marketing Strategy of Ethiopia (2016-2020)

According to ETO, the main goal of the strategy is to provide the ETO with a well-conceptualized and brand-focused marketing plan, which deals with tourism promotion at the national and regional levels and which facilitates the ETO to realize the best possible market positioning and demand growth over the next five years, 2016-2020. It is indicated that this strategy has been prepared by the Journey Tourism Consulting and Management www.thejourneytourism.com under the guidance of ETO.

Thus, this strategy, which is the focus of the review, is the first of its kind in the history of tourism industry in Ethiopia. ETO claims that the strategy is the outcome of systematic research, comprehensive fieldwork including analysis of secondary data, competitor benchmarking, meetings, various surveys (conducted both online and offline) and numerous stakeholder workshops, among other things.

The strategic document has eight sections and 134 pages with a sequential span extending from 2016 to 2020. It begins with an introduction that elucidates about the commitment of the GOE to strengthening the tourism sector, the role of tourism in job creation and poverty reduction culminated with a brief description about the importance of the strategic document to MoCT and how it has been prepared.

The second section illustrates the International Tourism Trends. It presents both the performance of global tourism and the relevance of global tourism trends to Ethiopia. The third section narrates about three issues: Market performance, tourism competitiveness and marketing SWOT analysis. It elucidates the current tourism situation in Ethiopia, its market share, continued with relative competitiveness and ended up with SWOT analysis performed on seven marketing pillars (four traditional Ps) and process, people and positioning.

Section four is concerned with the Vision, Objectives, Principles and Marketing Success Factors. These are presented here under:.

The Vision of MoCT, FDRE - Vision 2025

Ethiopia ranks among the top five destinations in Africa in tourism revenues, with tourism having a sustainable, highly positive impact on Ethiopia's economy and its socio-cultural and environmental landscape (ETO, 2015, P. 20).

Objectives

The following growth objectives are set for the period 2016 – 2025, in pursuit of the vision.

- I. Increase tourism arrivals by an average annual rate of 13% per annum to 3 million.
- II. Increase receipts per visitor by an average annual rate of 1.6% per annum to US\$1,100 (at current prices).
- III. Increase total tourism receipts by an average annual rate of 15% per annum to US\$3.4 billion (at current prices).



Guiding Principles

According to ETO, in the process of marketing Ethiopia the following three guiding principles will strengthen all actions and activities, namely, Authenticity, Sustainability and Social Sensitivity.

Marketing success factors

Based on the situation assessment and SWOT analysis, ETO identified eight factors which are considered of critical importance for achieving the growth objectives. These are:

- Achieving high levels of brand recognition
- Focusing on high-yield tourism markets
- Diversifying the range and quality of tourism products and experiences and packaging these to suit the needs and tastes of target markets
- Stepping up destination promotion
- Striving for service excellence and value for money
- Building a vibrant marketing partnership
- Strengthening human, online technology and financial marketing capacity and finally
- Measuring and monitoring results.
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Section five presents the main marketing foundations which contribute to the attainment of the vision and objectives. These are:

- A differentiated market positioning
- A brand of distinction
- High-yielding target source markets and segments
- Products and experiences that match market needs

In section six, five alternative strategy execution programs are discussed in detail. These include: Encounter the origin destination marketing campaign, Great Origin Routes, Tena Yistilign Ethiopia service quality drive, Ethiopia Tourism Information Network and Meet Ethiopia. Section seven elucidates about the second phase of strategy, which is implementation. Under this section, six activities are listed out. These are a staged approach to implementation, institutional strengthening, strong and functional partnerships, adequate funding, monitoring and evaluation as well as tracking progress.

Finally, in section eight, detailed action plan is presented. In this regard, list of activities, responsible stakeholders, required time and budget as well as success indicators are clearly specified. The last portion of the strategic document is backed with brief marketing SWOT analysis (pp 70-74), Market analysis (pp. 75-95), Online Marketing Strategy (pp. 96--113), MICE Strategy (pp. 114-119) and finally, Birding and Trekking Special Interest Segment Profiles (PP. 120- 127). Furthermore, 5 page index, (PP.128-133), which depicts the Ethiopian Airlines Destinations and Flight Times, (p.128) Broad Categorization of Visitors' information centers (VICs), references and acronyms are incorporated.



Strengths of Tourism Marketing Strategy of Ethiopia (2016-2020)

Despite some shortcomings, the strategy under review is thorough, contemporary, and well-articulated. In addition the following five strengths are revealed by the reviewer. These are:

- As a pioneer tourism marketing strategy of GOE, both the preparation and organization of the document is highly appreciated. As it has been indicated in the document, the strategy is the result of comprehensive research and analysis and stakeholder participation. Hence, this can be considered as a strong point.
- It clearly indicates all the components of a strategic document (like vision, objectives, and procedures for implementation, evaluation and control).
- Evidently, the document properly explained the role of various tourism stakeholders, which will help to avoid role confusion and improve efficiency.
- In this strategy, both the Implementation and evaluation and controlling mechanisms are clearly indicated.
- Most importantly, target market analysis and segmentation are suitably carried out and appropriate strategies for different niches are proposed.

Limitations of Tourism Marketing Strategy of Ethiopia (2016-2020)

Basically, it is difficult to point out technical and methodological errors from this strategic document as it has been prepared by renowned consulting firm having senior experts in the field. However, the following five points are explored and presented as below:

- The vision statement written in this strategy is not consistent with a vision appeared in the policy document and it will create confusion among practitioners. (Please refer, Tourism development policy, (2009:47).
- The document was proposed for a five year period (2016-2020) and sets what is known as Vision 2025. However, it doesn't show any intervention to be done in the interim years (2020-2025) and/or at the end of the strategy execution period.
- The marketing SWOT analysis is confined to seven tourism marketing pillars (4 traditional Ps along with process, people and positioning). The remaining five more mix elements (partnership, physical evidence, programming, packaging, and planet) are overlooked.
- ETO proposed to use strong digital advertising and social media focus with matching language (ETO, 2015:26). However, Ethiopia has the lowest internet penetration and is seeking alternative global promotion ways which is a strong recommendation.
- The country has launched a new brand, 'Land of Origins'. It is known that, Ethiopia is the origin of Humankind, the Source of the Blue Nile and produces great coffee. However, in the reviewer's view, the current brand essence seems general and doesn't clearly reflect its peculiar feature.

Hence, it would be very effective if the country's brand essence is like "Ethiopia - **cradle of mankind**". This is because, being the birth place of Humankind makes Ethiopia absolutely distinctive destination than any other nations in the globe. However, South Africa is now also using the designation 'Cradle of Humankind' after new hominid discoveries in Sterkfontein near Johannesburg.



Conclusions and Implications

By having carefully examining modern literature on tourism industry performance measurement, our paper presents modified KPIs on the subject, bringing together different metrics proposed by various authors in the field. As a result, the originality and contribution of this desk research is twofold.

Firstly, the paper attempted to draw academic attention towards under-researched areas of performance measurement of the tourism industry using multiple KPIs. Consequently, it identifies the relative position of the Ethiopian tourism industry compared to regional averages and in basic marketing metrics, the country's position is found to be lower and much still needs to be done to ensure that the country attracts adequate arrivals and receipts. Secondly, this study is a pioneer work, aimed at evaluating the tourism marketing strategy of GOE. The pitfalls in formulation of this strategy were identified and this calls for modification of the strategic document under discussion.

This study may hopefully contribute towards filling the existing literature gap in measurement of tourism marketing performance and strategy evaluation. Furthermore, it may serve as a spring board for the coming researchers who want to carry out further studies similar to this work.

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