Ethiopia Ministry of Culture and Tourism
Ethiopia Sustainable Tourism Development Project

Tourism Marketing Strategy for Ethiopia (2016-2020)

Prepared for the Ethiopian Tourism Organisation

November 2015

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Foreword

The Government of Ethiopia Tourism has designated tourism a priority growth sector and the establishment of the National Tourism Council under chairmanship of the Honourable Prime Minister is proof of the significance attached to the sector and the Government's high expectations for future tourism growth.

Since establishing the Ethiopian Tourism Organisation (ETO) in 2013 we have made good strides in developing an efficient and effective national tourism marketing organisation. ETO's management Board consists of independent professionals of the highest calibre and the organisation has progressed well in establishing a professional and skilled staff component.

This Ethiopia Marketing and Brand Strategy project is a very important and positive step forward in directing ETO's destination marketing approach and activities and supports our vision of ranking among the top five destinations in Africa in terms of tourism revenues by 2025.

The marketing strategy should be read in conjunction with the Ethiopia Tourism Brand Strategy, which was formulated simultaneously with the marketing strategy. The Brand Strategy sets out the brand personality, brand promise and brand essence of Destination Ethiopia and presents a visual trademark for promoting the destination. In addition, complementary regional marketing strategies have been formulated for Ethiopia's most prominent tourism regions namely Addis Ababa City, Amhara, Oromia, Tigrai and the Southern Nations, Nationalities and Peoples' Region.

Both the Marketing and Brand Strategies are the result of extensive consultations with public and private stakeholders in Ethiopia over an ten-month period and these provide solid foundations for a collaborative approach in promoting 'Ethiopia, Land of Origins' to our various target markets. This strategy document includes a range of innovative marketing concepts that address our most important promotional opportunities and challenges, as well as a practical implementation plan that will serve as a barometer of progress over the next five years.

I wish to thank the Ministry of Culture and Tourism, through their Ethiopia Sustainable Tourism Development Programme (ESTDP) for commissioning and funding both the Marketing and Brand Strategies.

We look forward to working with our public and private sector partners in implementing this strategy and in growing tourism as a powerful vehicle for economic growth and job creation over the next five years.

Solomon Tadesse

Chief Executive Officer
Ethiopian Tourism Organisation

November 2015

Executive Summary

The overall goal of this Marketing Strategy is to provide the Ethiopian Tourism Organisation (ETO) with a well-conceptualised and brand-focused marketing plan, which addresses tourism promotion at the national and regional levels and enables the ETO to achieve the best possible market positioning and demand growth over the next five years, 2016-2020.

The strategy capitalises on international travel trends such as the quest for authentic experiences, increasing demand for flexible travel itineraries, growth in youth travel as well as the more mature age segments, the potential offered by emerging and new growth markets, the growing importance of online marketing technologies and the resultant changing role of tour operators.

Tourism arrivals to Ethiopia have grown very well in recent years and Ethiopia has the advantage of being an all-year destination. Despite such good growth Ethiopia's tourism market share in Africa remains limited with the country occupying 12th place in tourist arrivals and 10th place in tourist revenues. Average expenditure per visitor is moderate and the share of leisure tourist arrivals is low, with most visitors being non-discretionary business travellers. Tourism is also unequally spread through the country with Addis Ababa and three other regions receiving the bulk of tourists.

An analysis of destination strengths, weaknesses, opportunities and threats reveals a spectrum of opportunities and challenges related to the seven marketing 'Ps' (positioning, products, promotion, price, place/distribution, people and processes). The following key competitive advantages and disadvantages are highlighted when comparing Ethiopia to regional competitors:

- *Competitive advantages:* a large number of unique, iconic tourist sites; Ethiopia's rich cultural diversity, ancient cultural practices and unique cultural traditions; the outstanding hospitality, friendliness and peacefulness of the people; ancient historical sites and relics; breath-taking scenic beauty and natural features; excellent air links; and good value-for-money offered to visitors.
- *Competitive disadvantages:* limited wildlife and safari experiences (compared to the rest of East Africa); limited city life and conferencing; few contemporary man-made attractions; limited hospitality facilities; land transport limitations; difficulty of planning and booking travel; limited skills and institutional capacity to operate, develop and promote tourism; and image barriers related to personal health and safety.

The following aspects underpin a 2025 tourism vision for Ethiopian tourism:

- *The vision* is for Ethiopia to rank 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.
- This will require achieving the following ambitious market *growth targets*: increasing tourism arrivals at an average annual rate of 13% per annum to 3 million; increasing receipts per visitor at an average annual rate of 1,6% per annum to US$1,100 (at current prices) and increasing total tourism receipts at an average annual rate of 15% per annum to US$3,4 billion (at current prices).
- The destination marketing strategy is underpinned by three *key principles* namely: retaining the authenticity of the experience; ensuring sustainability of environmental, historical and cultural resources; and managing tourism with sensitivity towards local traditions and community structures.
- Eight key *marketing success factors* are identified for achieving the vision and targets, namely: a) achieving higher levels of brand recognition; b) focusing on high-yield tourism markets and on

‘value’ rather than merely ‘volume’; c) diversifying the range of tourism products and experiences and packaging these to suit the needs and tastes of target markets; d) stepping up destination promotion; e) striving for service excellence and value for money; f) building a vibrant marketing partnership; g) strengthening human, technological and financial marketing capacity and h) improving marketing measurement, monitoring and knowledge.

The following marketing foundations are defined:

- *A differentiated market positioning* based on Ethiopia’s ‘Spirit of Originality’, which is evident in the many ‘origins’ to be found all over the country. These include, among others, the origin of humanity (the ‘Lucy’ fossil remains); the origin of a global coffee culture; the origin of a unique language founded in Ge’ez and manifested in Amharic; the origin of the ancient Axumite empire and its architectural achievements, carried through to various future Ethiopian empires; the origin of cultural tolerance and of a new nation on the rise; the origin of the Blue Nile river and other spectacular topographies (e.g. Lake Tana, Simien Mountains, Bale Mountains, Rift Valley lakes, spectacular river gorges, etc.); as well as the origin of various unique and endemic fauna and flora species.

  This positioning implies that Ethiopia is primarily a destination for experiencing and learning (more so than a holiday destination for relaxation), that the primary target market is the experience seeker, that the experiences offered need creative development and packaging and that the tourism brand is layered and multi-facetted and needs to be communicated as such.

- *Ethiopia’s brand of distinction* includes a unique brand promise and essence:
  - Brand Promise: ‘Ethiopia invites you to discover why it is the origin of so much history and culture, vibrantly alive in a landscape of dramatic beauty’
  - Brand Essence: ‘Ethiopia: Land of Origins’

- *High-yielding source markets and segments* to be *targeted* are:
  - *Source markets (countries)*
    - *Core markets (Capture and allocate 60% of marketing resources),* i.e. markets with high revenue potential, with an affinity for leisure travel to Ethiopia and that are easier and less costly to penetrate. These are: UK, Germany France, Italy, USA (East and West Coast areas), Saudi Arabia (especially during Middle East summer) and the domestic market
    - *Potential growth markets (Invest for Growth and allocate 20% of marketing resources),* i.e. markets with high revenue potential, low incidence of leisure travel to Ethiopia and that are more difficult and costly to penetrate. These are: China (focus on ‘2nd wave’ experiential travellers), Japan, Australia and Canada
    - *Steady markets (Maintain and allocate 10% of marketing resources)*: i.e. markets with lower revenue potential but with an affinity for leisure travel to Ethiopia and that are easier and less costly to penetrate. These are Benelux countries, Sweden/ Norway, Switzerland, Sudan, Kenya, Djibouti and Israel
    - *Opportunity markets (Watch and leverage with spare resources)*, i.e. markets with lower total revenue potential, lower incidence of leisure travel and that are more difficult to penetrate, but with some pockets of value. These are India, South Africa, Russia, Nigeria, Brazil, Korea and UAE
  - *Target market segments (traveller types)*
    - *Segments to Embrace*, which offer good growth value and which Ethiopia is ready to receive, with 60% of resources being focused here. These include Packaged Explorers, Tailored Explorers, Trekkers and Domestic and Regional Breaks

   - *Segments to Develop,* which offer good growth value but which Ethiopia is less ready to receive, with 30% of resources being focused here. These include Intrepid Explorers, MICE visitors and Adventure Sport Enthusiasts
   - *Segments to Leverage*, which Ethiopia is ready to receive but which do not offer particularly good growth value, with 10% of resources being focused here. These include birders, business travel extensions and other niche segments such as visitors interested in antiquities, religion and pilgrimage, archaeology, palaeontology, geology, anthropology, art, etc.

- *Products and experiences that match market needs, to be developed are:* The strategy defines suitable product development approaches and identifies priority development sites and experiences for servicing and attracting the identified target market segments, i.e.
   - *Packaged Explorers:* Focus product development on visitor convenience, management and interpretation at key historical sites on the traditional tourism circuits
   - *Domestic Breaks:* Focus product development on entertainment, relaxation and socialisation
   - *Tailored Explorers:* Focus product development on diversifying the range, quality and depth of experiences on offer
   - *Intrepid Explorers:* Focus product development on packaging extraordinary, off-the-beaten-track experiences and circuits, especially those of environmental and cultural value
   - *Special interest markets (Trekkers, Birders, Adventure Sport Enthusiasts)*: Focus product development on packaging special interest experiences and improving community hospitality
   - *MICE:* Focus product development on building capacity for hosting and expanding the Meetings, Incentives, Conventions and Exhibitions industry

The strategy will be executed through a portfolio of *five key programmes*, namely:

- *'Encounter The Origin campaign'***:** A three-year, multi-channel international and domestic promotional campaign, serving as an umbrella call to action and communication theme.

  Key elements: Creative campaign imagery applied to all visuals; website design improvements; multi-faceted digital and social media development drive; travel trade education and joint marketing initiatives; media promotion; domestic promotion campaign; events support.

- *'Great Origin Routes'***:** Development and packaging of core touring routes and sub-routes based on the main traditional circuits, complemented by a range of regional themed sub-routes to appeal to various market segments.

  Key elements: Identifying the core routes and complementary themed routes; auditing routes; mapping routes online and in print; forming route forums with local stakeholders; improving facilities and services on routes.

- *'Tena Yistilign':* An internal awareness and capacity building program to prepare and sensitise the tourism industry and communities towards welcoming visitors and raising the level of tourism awareness and knowledge.

  Key elements: Service quality awareness and training program; local interpretive guide training program; national tourism awards.

- *'Ethiopia 'i' Network':* A visitor information improvement program to ensure availability of high quality, well-branded and comprehensive visitor information online, in print and at visitor information centres.

Key elements: Audit and consolidate existing information print materials; Visitor Information Centre (VIC) classification, branding and improvement program.

- *'Meet Ethiopia':* A programme to optimise the power of Meetings, Incentives, Conventions and Exhibitions, especially given the gateway status of Addis Ababa.

  Key elements: Strengthening convention capacity at ETO; various MICE promotion activities.

A sensible and practical implementation approach will be followed during the five-year strategy period and the following approaches and actions will be executed:

- *Following a staged approach to implementation*, with the marketing strategy being implemented over three phases, namely:
  - Consolidation - laying sound marketing foundations (Years 1 and 2)
  - Escalation - stepping up marketing implementation and market growth (Years 3-5)
  - Expansion - achieving consistently high tourism growth (Year 6 and beyond)

Such implementation will require the following capacity building interventions:

- *Strengthening ETO and regional institutional marketing capacity*, recognising that implementing the strategy requires excellent knowledge and specialisation and pursuing a number of institutional success factors, including: strengthening ETO's organisational structure in support of the strategy; improving ETO conditions of employment; outsourcing certain specialist promotion components; appointing market-based representatives in key markets like the UK, Germany and possibly the USA; engaging foreign embassies and missions where appropriate; launching a concerted capacity building program to improve ETO knowledge and skills; and improving marketing capacity of regional Culture and Tourism Bureaus.

- *Building strong destination marketing partnerships* by establishing 'Team Ethiopia Tourism' as a formalised marketing partnership initiative between ETO and supportive public and private roleplayers; forming an active Tourism Marketing Committee and workgroups; and agreeing roles and responsibilities between ETO and the regional Culture and Tourism Bureaus, as defined in the strategy.

- *Securing adequate funding for tourism destination marketing* by instituting a tourism departure or bed levy, of which the proceeds will accrue to a hypothecated Tourism Growth Fund; and supplementing such funding with self-generated revenues.

- *Effective monitoring and evaluating the strategy* by improving the quality and reliability of tourism arrival statistics and conducting regular, high quality visitor departure surveys.

The strategy includes an *implementation action plan,* which indicates: the activities and elements that are to be carried out over the next five years; who should carry them out; broad estimated costs; and measurable success indicators. Importantly, the implementation action plan will serve as a framework for monitoring progress with implementing the strategy and for evaluating the extent of such progress.

Three factors are considered of critical importance for effectively tracking implementation of the plan, i.e.:

- *Mandating a specific individual to take ownership* of the strategy, coordinate its implementation and monitor progress with the Action Plan.

- *Urgent improvements to ensure valid and reliable tourism arrival statistics* for quantifying progress .

- Ensuring the involvement, support and *capacity building of regional Culture and Tourism Bureaus* in implementing the strategy and monitoring its progress.

1 Introduction

The Government of Ethiopia is committed to strengthening the tourism sector and recognises that tourism could play a vital role in creating more jobs and alleviating poverty. It has progressively increased investment in the sector, which it regards as an important engine for the overall economic growth of the nation.

This five-year tourism marketing strategy and the associated brand strategy (including a two-year action plan, brand identity and brand disciplines captured in a brand manual) are important initiatives under the Ministry of Culture and Tourism's 'Ethiopia Sustainable Tourism Program, ' (ESTDP). The national marketing strategy is complemented by marketing strategies for each of the five regions targeted under ESTDP, namely Amhara, Tigrai, Addis Ababa, Oromia and Southern Nations Nationalities and Peoples (SNNPR).

The overall goal of this Marketing and Branding Strategy is to provide the Ministry of Culture and Tourism and the destination development and marketing organisation the Ethiopian Tourism Organisation (ETO) with a well-conceptualised and brand-focused marketing strategy and action plan. The strategy addresses tourism promotion at the national and regional levels and should enable the ETO to achieve the best possible market positioning and demand growth over the next five years, 2016-2020.

The strategy is the result of intensive research and fieldwork including desk analysis, competitor benchmarking, stakeholder interviews and meetings, comprehensive field trips, online and telephonic travel trade surveys and various stakeholder workshops and brainstorm exercises.

This consolidated strategy document should be read in association with Report 2: Situation Analysis[1] that preceded the strategy formulation phase.

[1] Ethiopia Ministry of Culture and Tourism (2015): *Tourism Marketing and Branding Strategy for Ethiopia, Report 2: Situation Analysis*

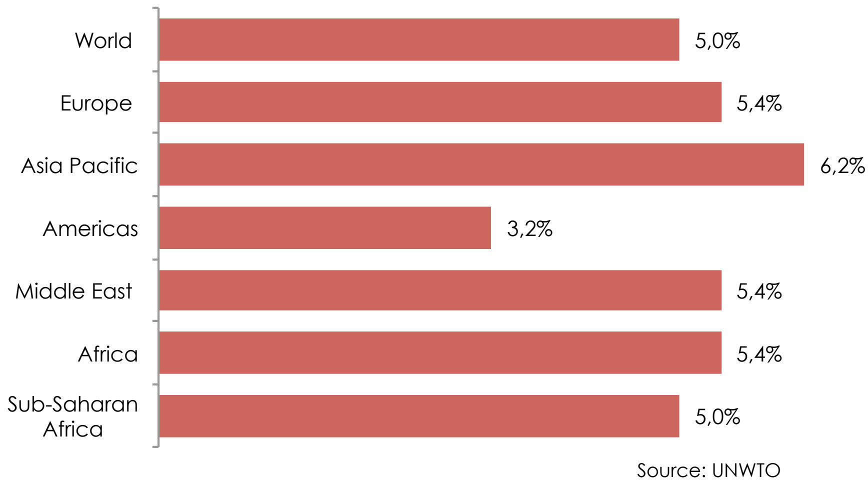
2 International Tourism Trends

The following global tourism performance and market trends are of particular relevance to Ethiopia tourism.

2.1 Global tourism performance

According to UNWTO [2] international tourist arrivals (overnight visitors) have shown virtually uninterrupted growth over the past more than 60 years – from 25 million in 1950 to 278 million in 1980, 528 million in 1995, and 1087 million in 2013. Arrivals grew by 5% worldwide in 2013, reaching a record 1,087 million, after topping the 1 billion mark in 2012. Asia and the Pacific recorded the strongest growth with a 6.2% increase in arrivals, followed by Europe and Africa, both recording 5.4% growth.

Fig. 2.1: Growth in international arrivals (by world region (% change 2013/12))



In 2013, travel for holidays, recreation and other forms of leisure accounted for just over half of all international tourist arrivals (52% or 568 million). Approximately 14% of international tourists reported travelling for business and professional purposes and another 27% travelled for other reasons, such as visiting friends and relatives (VFR), religious reasons and pilgrimages, health treatments, etc.

In 2013, global tourism receipts grew by 5% in real terms (taking into account exchange rate fluctuations and inflation) to reach US$ 1159 billion. Receipts in Africa were US$ 34 billion (a 3% share) and grew marginally by 0.6% in sub-Saharan Africa.

Worldwide tourist arrivals are expected to increase at an average rate of 3.3% a year over the period 2010 to 2030. The growth rate is expected to gradually slow from 3.8% in 2012 to 2.9% in 2030, however on top of ever-growing base numbers. Total arrivals are expected to reach 1.4 billion in 2020 and 1.8 billion in 2030. Emerging regions will gain market share, for example:

- Asia and Pacific: global share expected to rise from 22% in 2010 to 30% in 2030.
- Middle East: global share expected to rise from 6% in 2010 to 8% in 2030.
- Africa: global share expected to rise from 5% in 2010 to 7% in 2030. The average annual growth projected for *East Africa is 6.2% between 2010 and 2020,* and 5.5% between 2020 and 2030

Much of this market share growth of emerging regions will be driven by intra-regional travel (i.e. between countries in the same regions). The market share of Europe and the Americas will decline - Europe from 51% in 2010 to 41% in 2030 and the Americas from 16% in 2010 to 14% in 2030.

[2] UNWTO (2014): *Tourism highlights*

2.2 Global tourism trends of relevance to Ethiopia

The following key market trends are impacting on international tourism and are of particular relevance to Ethiopia[3] [4]. These should be regarded as key directions of travel that are of relevance to Ethiopia and will not necessarily impact on the entire international market place.

Global Trend	Implications for Ethiopia
Market trends and preferences	
Authenticity: Search for authentic and life-enriching experiences	• Draw on Ethiopia's hospitable people and age-old traditions, tribal diversities, contemporary culture, cuisine etc. • Ensure brand claims match expectations
Flexibility: More demand for customised travel, special interest experiences and flexibility in searching and selecting a holiday	• Gain knowledge and understanding of customised travel needs and ensure flexibly of promotions, packages and products to match preferences • Simplify travel planning and information provision
Experience seeking: Between 30%-50% of long haul travellers from main sources markets seek out and enjoy a variety of authentic, personal experiences they can talk about and in which they are actively involved, learning something and engaging with locals[5]	• Ethiopia is well-suited to appeal to the 'Experience Seeker' and every effort should be made to diversify the range, quality and creative packaging of the many experiences on offer while retaining the authentic character and appeal of resources
Maturity: An ageing population, with travel by seniors (65+) steadily growing and value for money becoming increasingly important	• Already a key market for Ethiopia and the destination needs to further prepare for it • Tailor specific messages and imagery to this market – focus on experiential, healthy and safe travel experiences • Ensure products and packages are fit for the market in terms of comfort and service levels
Youthful discovery: Growing youth travel market: Younger travellers are Internet savvy and tend to prefer locally owned accommodation. Furthermore, they like to learn and generally care about social and environmental issues	• Potentially a growth market • As with the ageing population marketing messages (particularly in social media) and packages could focus on this group • Destination websites and online marketing tools need to be mobile friendly, quick and informative

[3] Centre for Promotion of Imports (2014): *http://www.cbi.eu/market-information/tourism*
[4] ITB Berlin (2013): *ITB World Travel Trends Report*
[5] http://www.tourism.australia.com/documents/corporate/marketing_experience_factsheet.pdf

Global Trend	Implications for Ethiopia
Sustainability: Increased concern for sustainability among consumers and tour operators	• Stress the positive benefits to Ethiopia of tourism (both economic and social) as a key brand value • Ensure sensitive product development and respect carrying capacities of fragile natural and cultural resources
Value for money: High-end segments remain a stable market: long-haul travel remains attractive for consumers with high disposable incomes, although with a focus on affordable luxury	• Target consumers with high disposable incomes – the messages need to be about an aspirational experience and value for money
Emerging market growth: BRIC countries (Brazil, Russia, India and China) show high growth, although traditional source markets will remain at the core of global tourism demand	• Emerging markets should be tracked and entered in the medium term
Product, Promotion and Distribution trends	
Accommodation is a key element of the experience: Hoteliers are realising the importance of product differentiation in terms of design, food, service and ambience and are adapting their designs, staff training, interior decoration and added services accordingly	• Expose the accommodation sector to the latest international trends and innovations ranging from branded chains, boutique style hotels, luxury lodge developments, homestays, etc. • Attract international chains to invest or take up management contracts in Ethiopia and gain from their experience
Internet as travel driver: The Internet has emerged as an important source of inspiration for new travel destinations, not just for travel research and booking. Rise of travel meta-search engines and online travel agencies with travel bookers opting for 'one-stop shops', to compare different travel products and packages early in the purchase chain.	• Ensure excellent web-design, consistent across national and regional sites. • Maximise content management and collaboration with private and public sector content providers and booking partners to ensure visitors are able to use the destination website as an encompassing travel portal
Earned media power: Social media has become an integral part of travel planning - before, during and after a trip. Rising importance of online reviews that increasingly influence traveller's decisions to book a specific destination and product. The rise of the travel blogger vs. traditional media.	• Ensure social media is a central channel in promotional activity and capitalise on consumer interaction • Incorporate travel bloggers in marketing activity – particularly market based ones
Peer-to-peer, shared travel is increasing: with the advent of such websites such as AirBnB, Uber, Homeaway and Flipkey, which is shifting offline travel sales to online travel sales	• Use of user-generated content on DMO, social media and third-party websites to market the destination

Global Trend	Implications for Ethiopia
	• Increase personalisation of online experiences through tracking travellers' online search habits and delivering specific travel content that matches this, e.g. logging on to websites using social media profiles
Power of mobile: Travel bookings through mobile platforms are growing to the extent where in 2015, PhoCusWright estimates mobile accounted for a quarter of US online travel sales. The convergence of mobile and desktop means travellers are using various devices to plan their journeys	• Ensure websites and digital communication is mobile friendly and develop mobile applications that provide personalised local experiences and travel ideas based on traveller preference, e.g. Singapore Tourism Board's 'Your Singapore Guide' • Ensure relevant content to appeal across devices
Changing role of tour operators: As consumers are becoming more experienced and online planning and booking is becoming easier and more common, the role and function of outbound operators is fast changing, from being the sole, general travel arrangement channel to being specialists in destination knowledge, advice, seeking out and packaging experiences and activities that suit ever evolving tastes, need, etc., especially for developing destinations like Ethiopia that offer experiential journeys more than relaxation	• Provide high quality travel trade education programs focusing on unique and special interest experiences, including online information and training materials, familiarisation visits, workshops etc. • Work with local communities and authorities to develop tourism attractions and services focusing on routes and itineraries to suit various interests and activities
Tour operators becoming more specialised: As the demand for niche experiences like adventure sport, photography, birding etc. grows, operators are becoming increasingly specialised in these areas (See *Addendum E*)	• Get to know the most appropriate outbound operators for selling the various experiences and establish sound relationships with them • Specialist staff should be appointed and staff knowledge should be developed in targeted segments

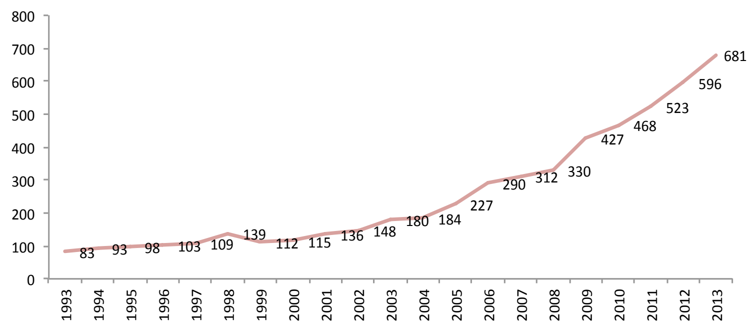
3 Current Situation

This section is extracted from Report 2: Situation Analysis, which contains a thorough assessment of the current tourism situation in Ethiopia.

3.1 Market performance

The following key performance trends should be addressed in the marketing strategy.

Fig. 3.1: Ethiopia - International Arrivals (1993 -2013)

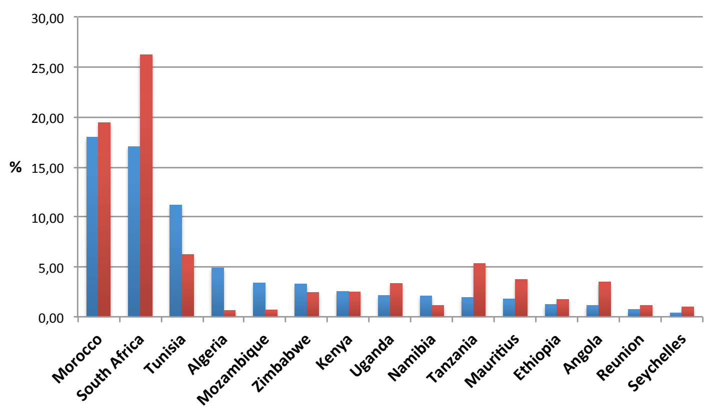


Source: MoCT / UNWTO
Data relates to '000 visits .

Good tourism growth

Ethiopia's tourism arrivals have more than trebled since 2005 from 227,000 to 681,000 in 2013. Tourism receipts have almost quadrupled during this period. In comparison total tourism receipts to Africa increased only 1,5 times over this period and more established destinations like South Africa and Mauritius experienced below average growth in receipts.

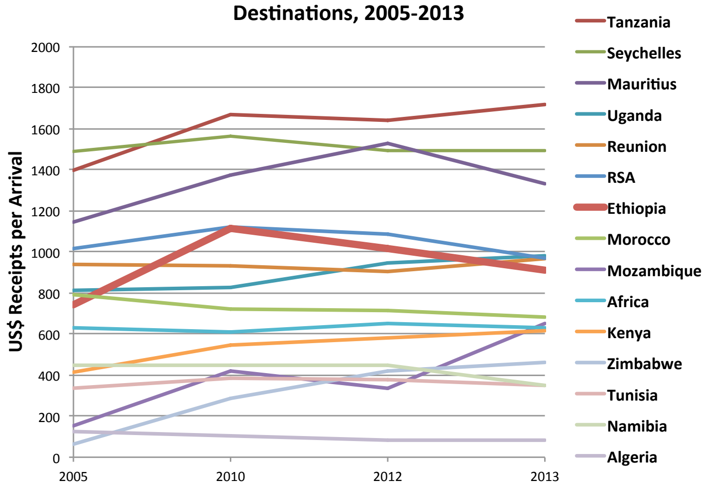
Fig 3.2: Share of Africa's Tourism Arrivals and Receipts: Ethiopia and Key African Destinations, 2013



Small market share

Ethiopia is an emerging destination that currently receives a small share of arrivals and is ranked 12th in terms of tourist arrivals and 10th in terms of receipts in Africa. In East Africa Tanzania, Kenya and Uganda have larger market shares.

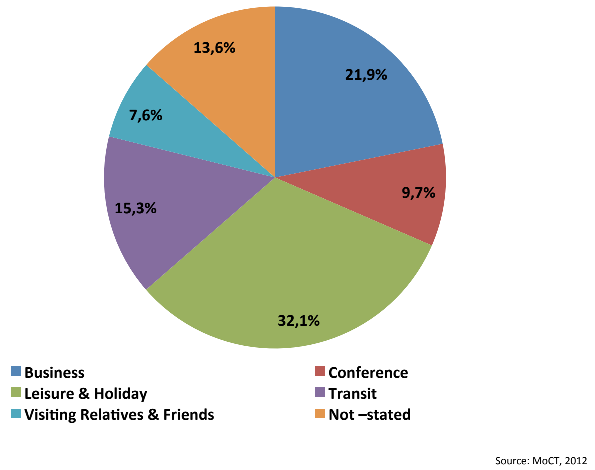
Fig 3.3: Receipts per Arrival (US$), Ethiopia and Key African Destinations, 2005-2013



Moderate yield per visitor

Ethiopia records average receipts of around US$900 per visitors, placing it in the 'average' yield category with Uganda, Reunion and South Africa but above the lower yield destinations like Mozambique, Kenya, Zimbabwe, Tunisia, etc. Tanzania, Seychelles and Mauritius are high yield destinations that earn around US$1,500 and more per visitor.

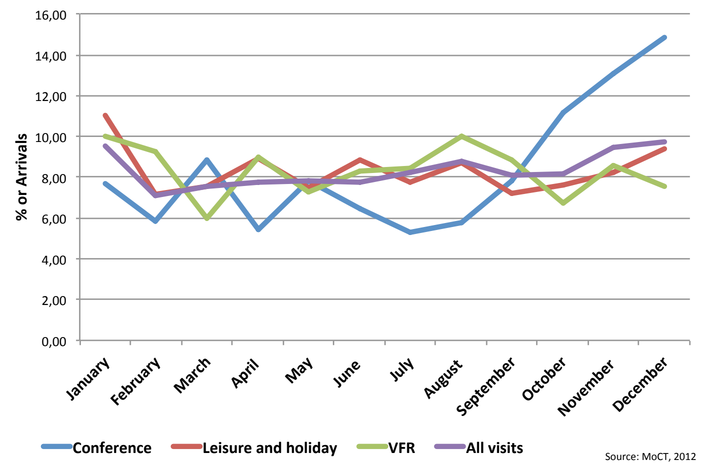
Fig 3.4: Arrivals to Ethiopia by Purpose, 2012



Limited leisure tourism share of arrivals

The share of arrivals contributed by leisure tourism is limited and in 2013 only about one third of arrivals (about 230,000 visitors) visited for leisure purposes.

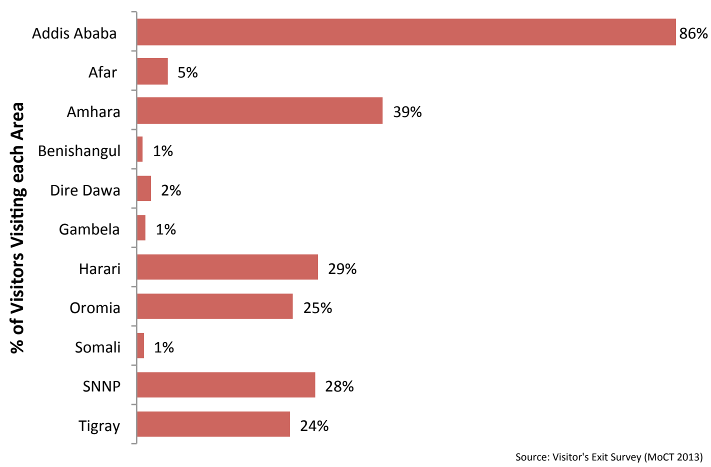
Fig 3.5: Arrivals to Ethiopia by Month, 2012



Seasonal consistency

Overall, arrivals to Ethiopia are relatively consistent throughout the year. Such consistent visitor flows support the viability of tourism businesses and sustainable tourism employment. Arrivals for Visiting Friends and Relatives (VFR) are high during the religious festival season in December-January, while conferencing fluctuates, with a low season from May to September and a high season from October to December.

Fig 3.6: Regional distribution of Visitors to Ethiopia



Skewed regional distribution of tourism

Due to Addis Ababa's status as an air arrival hub 86% of visitors visit the city. Five other destinations (Amhara, Harar, Oromia, SNNPR and Tigrai) receive 25% or more of all visitors, while fewer than 5% of visitors visit the remaining five regions (Afar, Benishangul, Dire Dawa, Gambela and Somali).

In addition to the above:

- Current leisure visitors are slightly skewed in favour of the 50-70 years age group, although a significant proportion of visitors fall in the 31-40 years and 41-50 years age groups.

- Gender is skewed (70/30) in favour of male visitors, although indications are that the gender mix is more balanced among leisure visitors.

3.2 Tourism competitiveness

Global competitiveness

The World Economic Forum (2013)[6] ranks Ethiopia 120th out of 140 countries in its travel and tourism competitiveness index. This is based on 14 competitiveness indicators, which are outlined in the table and figure below.

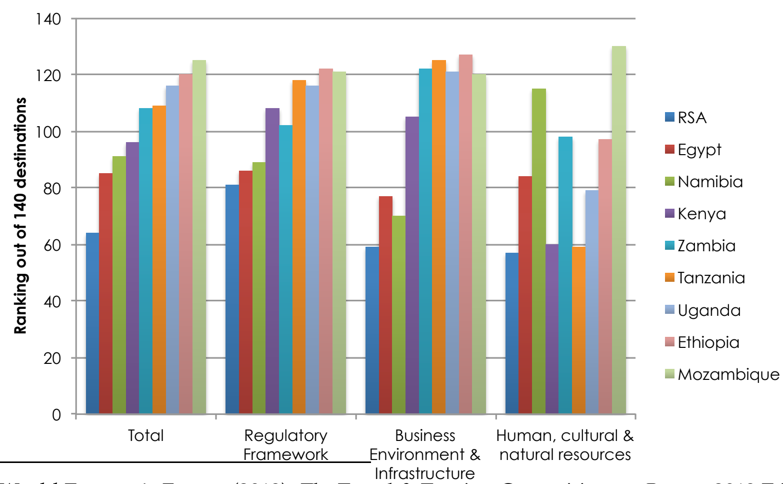
Ethiopia scores well on its *price competitiveness* (which is based on factors like price parity, airport charges, hotel prices) – ranked 22nd in the world – and *natural resources* (based on the number of World Heritage sites, quality of the natural environment, total known species) – ranked 33rd in the world. Other areas where Ethiopia scores favourably are cultural resources, environmental sustainability, safety and security and air transport infrastructure.

It scores more poorly in terms of *ICT infrastructure* (based on factors like internet use, mobile and broadband subscriptions, ICT use), *tourism infrastructure* (based on the number of hotel rooms and ATMs, and major car rental companies) and *policy rules and regulations* (based on a range of measures such as visa requirements, costs to start a business, transparency of government policy making).

Table 3.1: Ethiopia's scores on the T&T Competitiveness Index

Global Competitiveness Indicators	Global Rank (out of 140)	Score (1-7)
Overall Travel & Tourism Competitiveness Index	120	3.3
Travel &Tourism regulatory framework	122	3.6
Policy rules and regulations	132	3.4
Environmental sustainability	90	4.4
Safety and security	90	4.3
Health and hygiene	118	2.4
Prioritization of Travel & Tourism	115	3.5
Business environment and infrastructure	127	2.7
Air transport infrastructure	90	2.6
Ground transport infrastructure	118	2.8
Tourism infrastructure	135	1.3
ICT infrastructure	138	1.4
Price competitiveness in the T&T industry	22	5.1
Travel and tourism human, cultural, and natural resources	97	3.6
Human resources	126	3
Education and training	126	3.2
Availability of qualified labour	126	4.2
Affinity for Travel & Tourism	120	4.2
Natural resources	33	4.5
Cultural resources	82	2.1

Fig. 3.7: Ethiopia Competitiveness Ranking against Selected Competitors in Africa



Ethiopia's relative lack of competitiveness against a number of comparator destinations in the region is summarized in the adjacent chart. Tourism competitiveness is deemed to be on par with developing destinations like Uganda and Mozambique, but lags behind more established destinations like Kenya, Egypt,

[6] World Economic Forum (2013): *The Travel & Tourism Competitiveness Report*, 2013 Edition

Namibia and South Africa. Ethiopia's limited competitiveness is echoed in a number of studies[7]. These highlight strengths in terms of diversified source markets and market segments, its importance as a diplomatic centre and regional air hub, and its complementary offer with neighbouring destinations like Kenya and Tanzania.

However, various weaknesses in the Ethiopian offer are identified, including:

- Misperceptions about the destination, including social conditions, etc.
- Pre-visit informational and destination marketing limitations
- Visa and customs issues and difficulties
- Limited quality of accommodation, restaurants, and visitor attractions
- Limited quality and variety of activities, crafts and gifts
- Challenges of getting around in the country
- Inconsistent quality of inbound operators and tour guides
- Destination planning and investment challenges
- Human resources challenges
- A lack of market intelligence

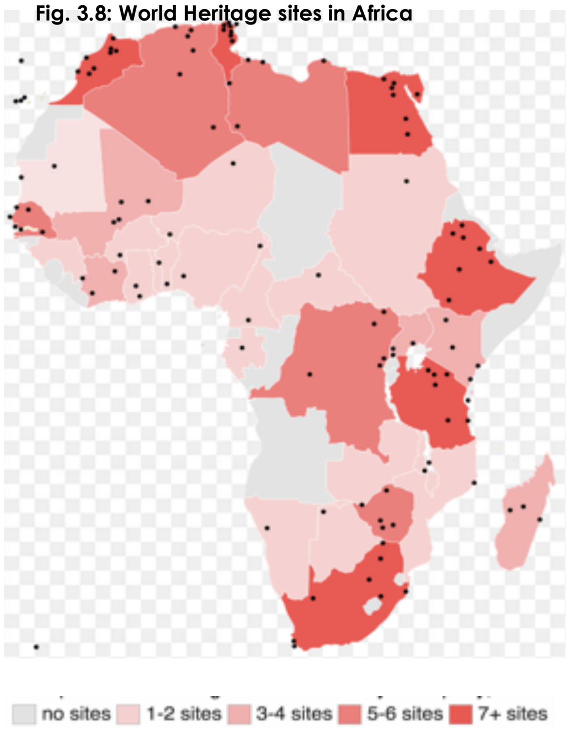


Fig. 3.8: World Heritage sites in Africa

Competitor analysis

The competitor analysis focuses on key tourism destinations of similar or larger scale than Ethiopia in East and Southern Africa and the Gulf region. These include Jordan, Egypt, Kenya, Tanzania, Uganda, and South Africa. A comparison of Ethiopia's advantages and disadvantages relative to these competitors is presented in Figure 3.9 below and reveals the following:

- In terms of *unique, iconic sites* to visit i.e. places declared as UNESCO World Heritage Sites (see adjacent figure), Ethiopia is on par with Egypt, Tanzania and South Africa and is better placed than Jordan, Kenya and Uganda
- Ethiopia's rich *cultural diversity, ancient cultural practices and its unique cultural character* that spans both the Arabic and Africa world provides it with distinct advantage over all other competitors
- Similarly the *outstanding hospitality, friendliness and peacefulness of the people* is a distinguishing feature that sets the destination apart from other competitors
- Ethiopia is only exceeded by Egypt when it comes to *historical sites and relics*. It is on par with Jordan and more attractive than other Eastern and Southern Africa destinations in this regard
- Concerning *scenic beauty and natural features* Ethiopia outperforms all regional competitors except South Africa

[7] These include:

- ODI (2009): *Enhancing private sector and community engagement in tourism services in Ethiopia*
- World Bank Group (2012): *Ethiopia's tourism sector: Strategic paths to competitiveness and Job creation*, in association with MoCT
- ETO (2014): *Preliminary identification of weaknesses/problems of the tourism sector in Ethiopia*

Fig. 3.9: Competitor comparison of regional competitors vs. Ethiopia

REGIONAL COMPETITORS	Kenya	Tanzania	Egypt	Uganda	Jordan	South Africa
Selling proposition	Classic safari, affordable mass beach	High end safari, beach, & adventure	Ancient history, mass beach	Ecotourism and adventure	Ancient history, high end wellness	Contemporary Africa, nature & scenery
Volume: ('000 arrivals 2013) Ethiopia = 681 **Yield:** (USD/arrival) Ethiopia = USD 909 **Value Point**: Ethiopia = Medium-high	1,433 617 Low-Medium	1,063 1,768 High	9,174 659 Medium	1,206 982 Medium-high	3,945 1,043 Medium-High	9,537 968 Medium-high
Factors of competitiveness						
TOURISM RESOURCES						
Unique sites/Iconic experiences	Advantage	Equal	Equal	Advantage	Advantage	Equal
Wildlife and safari	Disadvantage	Disadvantage	Advantage	Equal	Advantage	Disadvantage
Cultural uniqueness/people	Advantage	Advantage	Advantage	Advantage	Advantage	Advantage
Historical sites and relics	Advantage	Advantage	Disadvantage	Advantage	Equal	Advantage
Scenic beauty and natural features	Advantage	Advantage	Advantage	Advantage	Advantage	Disadvantage
City life and conferencing	Equal	Advantage	Disadvantage	Advantage	Disadvantage	Disadvantage
People hospitality, peacefulness	Advantage	Advantage	Advantage	Advantage	Advantage	Advantage
Contemporary man-made attractions	Equal	Equal	Equal	Equal	Disadvantage	Disadvantage
TOURISM SUPPORT SERVICES						
Hospitality (accommodation, catering)	Disadvantage	Disadvantage	Disadvantage	Equal	Disadvantage	Disadvantage
Land transport	Disadvantage	Equal	Disadvantage	Advantage	Disadvantage	Disadvantage
Air access	Equal	Advantage	Equal	Advantage	Advantage	Equal
DEMAND CONDITIONS						
Size/proximity of major markets	Equal	Advantage	Disadvantage	Advantage	Disadvantage	Disadvantage
Value for money	Equal	Advantage	Equal	Advantage	Advantage	Equal
Ease of arrangment and purchase	Disadvantage	Disadvantage	Disadvantage	Equal	Disadvantage	Disadvantage
Image of health, safety	Advantage	Disadvantage	Advantage	Equal	Equal	Equal
INDUSTRY CAPACITY						
Human resources	Disadvantage	Disadvantage	Disadvantage	Equal	Disadvantage	Disadvantage
Tourism entrepreneurship/innovation	Disadvantage	Disadvantage	Disadvantage	Equal	Disadvantage	Disadvantage
Tourism institutions and funding	Disadvantage	Disadvantage	Disadvantage	Equal	Disadvantage	Disadvantage
Colour Key:	Ethiopia at an advantage		Ethiopia Equal		Ethiopia at a disadvantage	

- In terms of tourism support services and demand conditions Ethiopia's *excellent air links and good value-for-money* are two major advantages
- Ethiopia is at a *disadvantage* concerning wildlife and safari, city life and conferencing and contemporary man-made attractions
- Factors that *constrain the country's tourism competitiveness* are limited hospitality facilities, land transport limitations, difficulty of planning and booking travel and most importantly the limited human resources and institutional capacity to operate, develop and promote tourism
- While *image barriers* related to personal health and safety are real, such perceived risks are even more relevant to competitors such as Kenya and Egypt and are of equal concern in Uganda, Jordan and South Africa

3.3 Marketing strengths, weaknesses, opportunities and threats (SWOT)

The following abridged SWOT analysis should be read in conjunction with the detailed assessment contained in *Addendum A*.

Strengths	Weaknesses
Positioning	
• Growing, positive global country awareness and recognition • Excellent resources for tourism growth • Good recent tourism growth • Tourism is a government priority • Consistent visitor flows through the year • Above-average length of stay • Good visitor safety	• Limited global awareness of Ethiopia as tourism destination • Prevailing market misperceptions • Fragmented and unclear brand image • Limited leisure visitor share • Moderate receipts per visitor • Tourism infrastructure and service weaknesses • Tourism is concentrated in a few areas • Visitor health and hygiene factors require improvement
Product	
• A broad range of globally recognised tourism landmarks, including World Heritage Sites • Unique cultural and religious events with tourism potential • Exceptional special interest products, e.g. birding, anthropology, adventure sport • Some examples of excellent community-based tourism experiences, such as community guiding, trekking, cultural interactions, etc.	• Inadequate range and quality of commercial leisure tourism facilities and services • Insufficient product interpretation and packaging • Gap in visitor infrastructures and services • Lack of a tourism events strategy and calendar • Limited support for community-based tourism projects to ensure their sustainability
Promotion	
• Some good printed marketing collateral • Public-private partnership initiatives in trade fairs between ETO, Ethiopian Airlines and tour operators	• Limited destination promotional initiatives • Marketing operations mostly geared at traditional segments, methods and channels • Major lack of digital promotion • Disjointed imagery and promotional materials • Tourism fair attendance lacks a clear strategy
Place/distribution	
• Expansive network of regional tourist information offices • Excellent air connectivity • Loyal but limited travel channel support	• Tourist information offices in need of support and refurbishment • Poor travel trade awareness and knowledge • Immature local tour operator channel • Poor internet connectivity
Price	
• Moderate value for money with some good value aspects	• Relatively high local transport costs • Some price inconsistency and fragmentation
People	

• Friendliness and openness of citizens a major advantage	• Local awareness of tourism lacking • Limited marketing capacity and skills
Processes	
• Good marketing institutional model • Basis laid for public-private partnership • Exit surveys are a good start to improving market intelligence	• Weak ETO and regional marketing capacity • Inadequate marketing funding • Poor foothold in target markets • Limited public-private marketing partnerships • Inadequate market measurement and research
Opportunities	**Threats**
Positioning	
• Capitalising on favourable global trends of the growing experiential travel market • Promoting the strong brand themes on offer • Developing MICE tourism • Promoting Ethiopia's 'new beginnings'	• Destruction of fragile environmental resources • Potential local and East Africa natural and human crises
Product	
• Packaging largely unexplored but unique experiences • Deepening and intensifying the journey	• Inability to manage visitor pressures • Slow investment take-up in upmarket facilities and products in leisure areas
Promotion	
• Leveraging latent market segments • Promoting domestic tourism • Expanding the range and quality of experiences offered to flexible and independent traveller segments • Capitalising on Ethiopia's popularity with the more mature visitor • Capitalising on East Africa complementarity • Partnering commercial travel guides • Producing high quality promotional tools	• Continued poor internet connectivity and inability to adapt to communication technologies
Price	
• Continuously improving value for money	• Danger of 'expensive' perceptions
Place/distribution	
• Increasing collaboration with Ethiopian Airlines	• Inadequate adaptation to online marketing dynamics and channels
People	
• Retaining and building on the authentic hospitality of the Ethiopian people	• Negative social and cultural impacts of unmanaged tourism and other commercial developments
Processes	
• Building a strong Team Ethiopia Tourism marketing partnership	• Continued underfunding and under-capacity of ETO

4 Future Vision

4.1 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

4.2 Objectives

The following growth objectives are set for the period 2016 – 2025, in pursuit of the vision[8].

- Increase tourism arrivals by an average annual rate of 13% per annum to 3 million
- Increase receipts per visitor by an average annual rate of 1,6% per annum to US$1,100 (at current prices)
- Increase total tourism receipts by an average annual rate of 15% per annum to US$3,4 billion (at current prices)

4.3 Principles

In marketing Ethiopia the following three principles will underpin all actions and activities:

Authenticity

The authentic lifestyle, culture and physical environment are important brand assets and tourism growth will be managed to preserve such authenticity.

Sustainability

Ethiopia's environmental, historical and cultural attractions are fragile and sustainable practices will receive priority in marketing, visitor management and product development initiatives.

Social sensitivity

The social and tribal traditions of Ethiopia's people have been maintained over centuries and tourism will be managed and promoted with care and sensitivity to retain and conserve these.

[8] Based on UNWTO (2015). The growth objectives are based on the vision for Ethiopia to rank fifth in Africa in tourist revenues. The assumptions underpinning objectives are a) that tourism arrivals to other African countries will increase at the same average growth rates as those achieved over the period 2010-2013 and b) that average receipts per visitor will remain at current levels for all other African countries

4.4 Marketing success factors

Based on the situation assessment and SWOT analysis, the following factors are considered of critical importance for achieving the growth objectives:

1. Achieving high levels of brand recognition

Promote a compelling and differentiated tourism positioning and brand identity and project a complementary 'house of brands'.

2. Focusing on high-yield tourism markets

Be 'value' rather than merely 'volume' driven, with an emphasis on optimising tourism revenues and jobs and focusing marketing resources on higher-spending leisure and business tourism markets with a high probability of conversion.

3. Diversifying the range and quality of tourism products and experiences and packaging these to suit the needs and tastes of target markets

Capitalise on fast diversifying global traveller markets by expanding the range of tourism attractions and commercial products and improving the packaging and presentation of experiences to suit varying traveller interests.

4. Stepping up destination promotion

Launch a coordinated and multi-faceted international and domestic leisure marketing drive, applying a mix of promotional actions and capitalising on the growth in online travel planning and purchasing.

5. Striving for service excellence and value for money

Improve product and service quality and value for money of both private and public tourism facilities and services.

6. Building a vibrant marketing partnership

Establish 'Team Ethiopia', a strong and vibrant national-regional and public-private marketing partnership, to maximise marketing impact.

7. Strengthening human, online technology and financial marketing capacity

Strengthen human capacity, online technology and financial marketing capacity of ETO, Regional Tourism Bureaus, private sector and tourism communities.

8. Measuring and monitoring results

Improve market measurement, monitoring and knowledge including data collection, analysis and reporting.

5 Growth Foundations

The following section sets out the main marketing foundations that underpin the vision and objectives. These are:

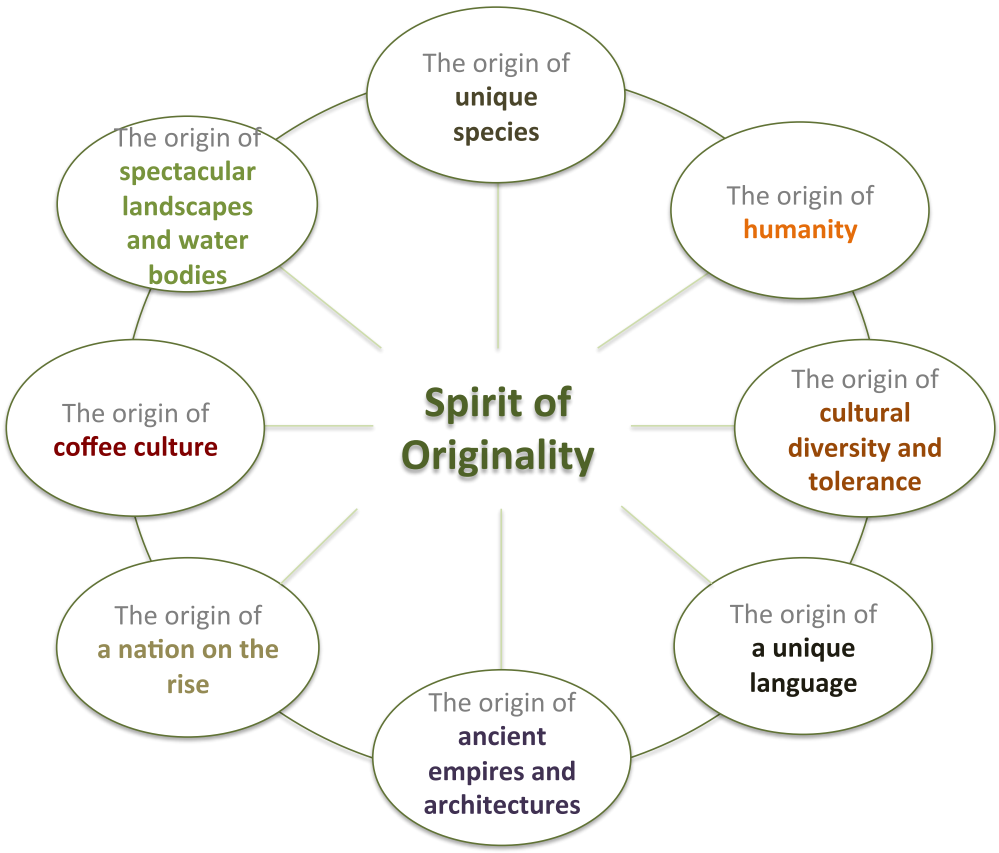
- A differentiated market positioning
- A brand of distinction
- High-yielding target source markets and segments
- Products and experiences that match market needs

5.1 A differentiated positioning

Ethiopia is as 'original' as it gets; authenticity is engrained in the lifestyle, landscapes, nature, history and heritage. In addition the hospitality of Ethiopia's people towards each other and visitors is unique. Visitors are attracted and fascinated by this 'spirit of originality', which may be attributable to various factors, including the fact that the country has never been colonised, the geomorphological forces that have carved unique land and life forms, the confluence of cultures and religions and other factors.

This 'Spirit of Originality[9]' presents Ethiopia with a unique selling proposition and a strong call to action for travellers to explore the many 'origins' that are prevalent throughout the country.

Fig. 5.1: Ethiopia's Differentiated Market Positioning



Some key implications of this positioning for the marketing strategy are:

[9] The positioning statement should not be confused with a brand slogan; it presents the point of differentiation on which Ethiopia will be promoted. The positioning statement will be translated into a marketing brand

The journey is the destination: Ethiopia is primarily a travel destination for experiencing and learning, more so than a holiday destination for relaxation. This has implications across the entire tourism value chain ranging from visitor access and mobility to community involvement.

The target market is the experience seeker: Those who want more out of a trip than looking, sitting and eating; who prefer to see, touch, and taste and engage with the 'spirit of place'. Targeting and focusing on such travel segments is an important requirement for achieving rapid and sustainable tourism growth.

The experience needs development and packaging: The variety of attractions and experiences in Ethiopia are spread across the country and access to, availability and quality of visitor services vary considerably from place to place. Product packaging and improvement are of critical importance. Presenting such attractions and experiences to visitors requires a strong public-private partnership, with private investors developing commercial facilities and services, private tour operators linking experiences and attractions as itineraries that can be sold to visitors and public tourism bodies promoting travel destinations and routes, providing public visitor services and improving sites.

The brand is layered: The 'spirit of originality' is a multi-facetted positioning and it should be creatively expressed as a captivating brand identity and architecture that inspires across market and product segments.

5.2 A brand of distinction

The following diagram summarises the brand promise and brand essence of Ethiopia. It should be read in conjunction with the *Ethiopia Brand Strategy* and the *Ethiopia Tourism Brand Manual*, which set out the brand identity comprehensively.

The brand 'story' can be summarised as follows:

If you desire the freedom to find out who you are through exploring the world with a goal of experiencing a better, more authentic, more fulfilling life, then Ethiopia is a part of your journey.

For Ethiopia will give you such a wealth of discovery that your curiosity will be stimulated and satisfied in a continual cycle of anticipation and reward.

Ethiopia invites you to discover why it is the origin of so much history and culture, vibrantly alive in a landscape of dramatic beauty.

As you travel across her great heights and deep places you will experience the origins of humankind and of species, of spirituality and of civilisation. You will meet her people and they will welcome you and you will experience the origin of tolerance and the origin of a value system that helps you rediscover humanity. Make the time to share a pot of coffee and you will find out about the origins of trade, of power and of independence.

Make the time to explore Ethiopia and you will even understand the origin of time itself.

Fig. 5.2: The Brand Promise and Essence

Self-analysis	Stakeholder analysis	Competitive analysis
Ethiopia is **the origin of so much**: from humankind, to civilisation, from natural tolerance of diversity to the global coffee culture – from the profound to the sensual – all supported by the regions.	Ethiopia is the origin of so much: a **history** that is a mysterious mixture of fact, myth and legend; a **culture** that is vibrantly alive and that finds its proud roots in the history; and a dramatic **landscape** that is primal in its extremes.	Ethiopia is **an adventure** in which **Ethiopians** will **welcome your participation**, involving you in their **rich past** and inspiring you with a **future full of potential**.

Ethiopia's tourism brand promise

Ethiopia invites you to discover why it is the origin of so much history and culture, vibrantly alive in a landscape of dramatic beauty.

Ethiopia tourism brand essence

LAND OF ORIGINS

The overall unifying idea

The origin of so much, from humankind, to civilization, from tolerance of diversity to the strength of unity, in a place of dramatic beauty – all supported by the regional brand promises that substantiate this claim.

Addis Ababa: Hub of African diplomacy: This vibrant, entrepreneurial and historically significant city is a hub of African commerce and diplomacy.

Afar: Birthplace of humankind: This strange, otherworldly landscape, which is still giving birth to itself, also gave birth to humankind.

Amhara: Soul-enriching wonders: The ancient mysteries of Lalibela, spectacular landscapes of the Simiens, imperial architectures of Gondar and source of the Blue Nile at Lake Tana touch the heart and soul.

Benishangul-Gumuz: Essence of power: Providing the power to drive a thriving nation, through a combination of a dramatic landscape with strong flowing water and, most importantly, the will of the people.

Dire Dawa: Crossroads of trade: An economic and rail hub where traders and travellers have always been welcome.

Gambela: Where species congregate: A place of natural wonder where the great migrations give one an understanding of the inevitability of evolution.

Harari: The living museum: Where the peast embrances the present

Oromia: Humanity and nature in unity: In this dramatic landscape of deep places, great heights and cool lakes you will discover a value system on which humanity is founded.

Somali: Never-ending horizons: In this space of far horizons you will rediscover your own growth.

Southern Nations: Cultural mosaic: A colourful mosaic of cultures united in their diversity by a unifying love of their ancient and bountiful land.

Tigrai: Roots of civilization: The beginnings of civilisation founded in a history of empire that goes back to a time of legends.

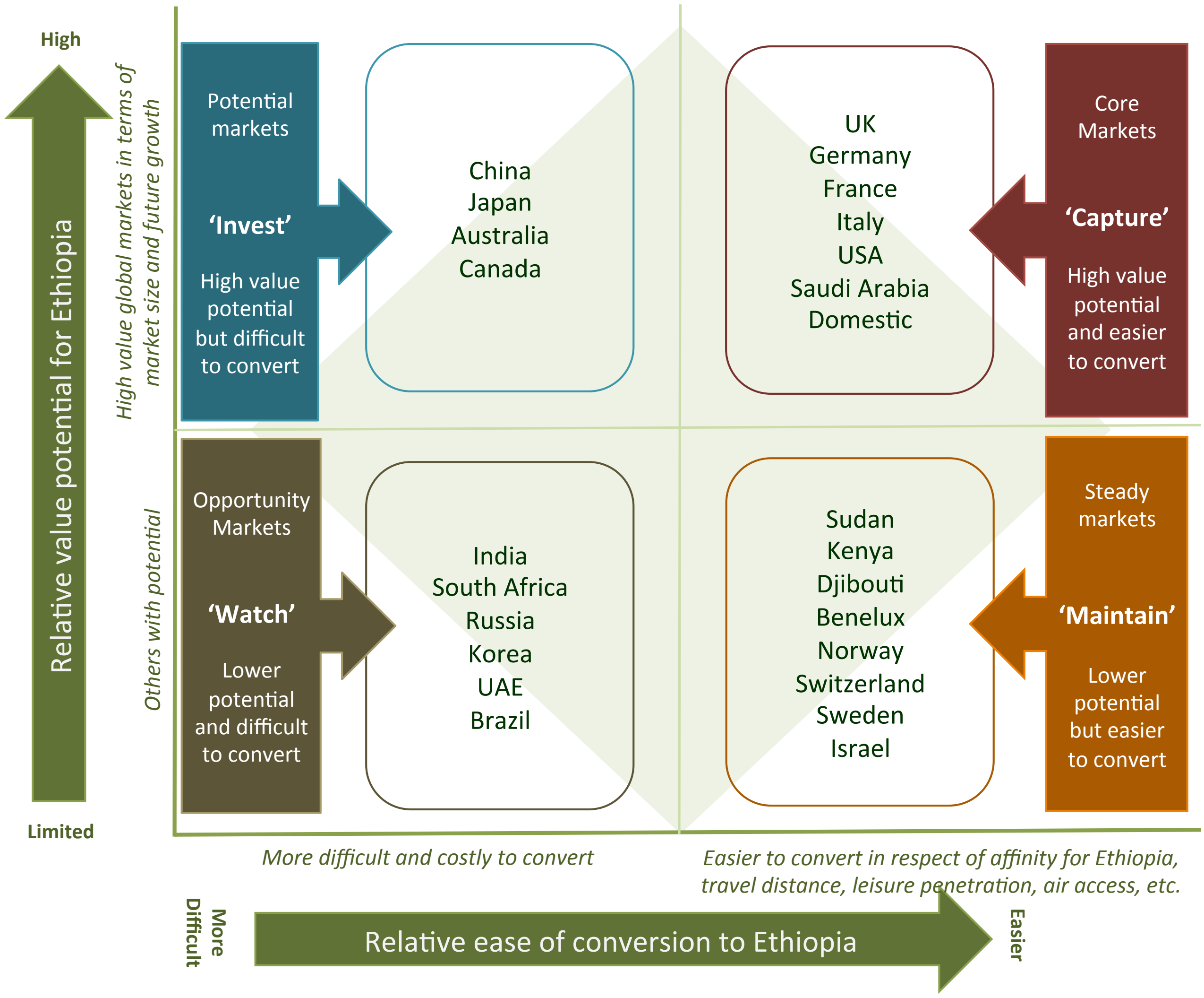
5.3 High-yielding target source markets and segments

The following section set out the target market strategy in terms of both source markets and market segments. This section should be read in conjunction with the more detailed market analysis presented in *Addendum B*.

Source markets

Potential source markets were analysed in terms of their tourism value potential on the one hand and the relative ease of attracting them and converting such potential to Ethiopia on the other. Results are as follows:

Fig. 5.3: Target Source Markets and Approaches



The following approaches will be followed:

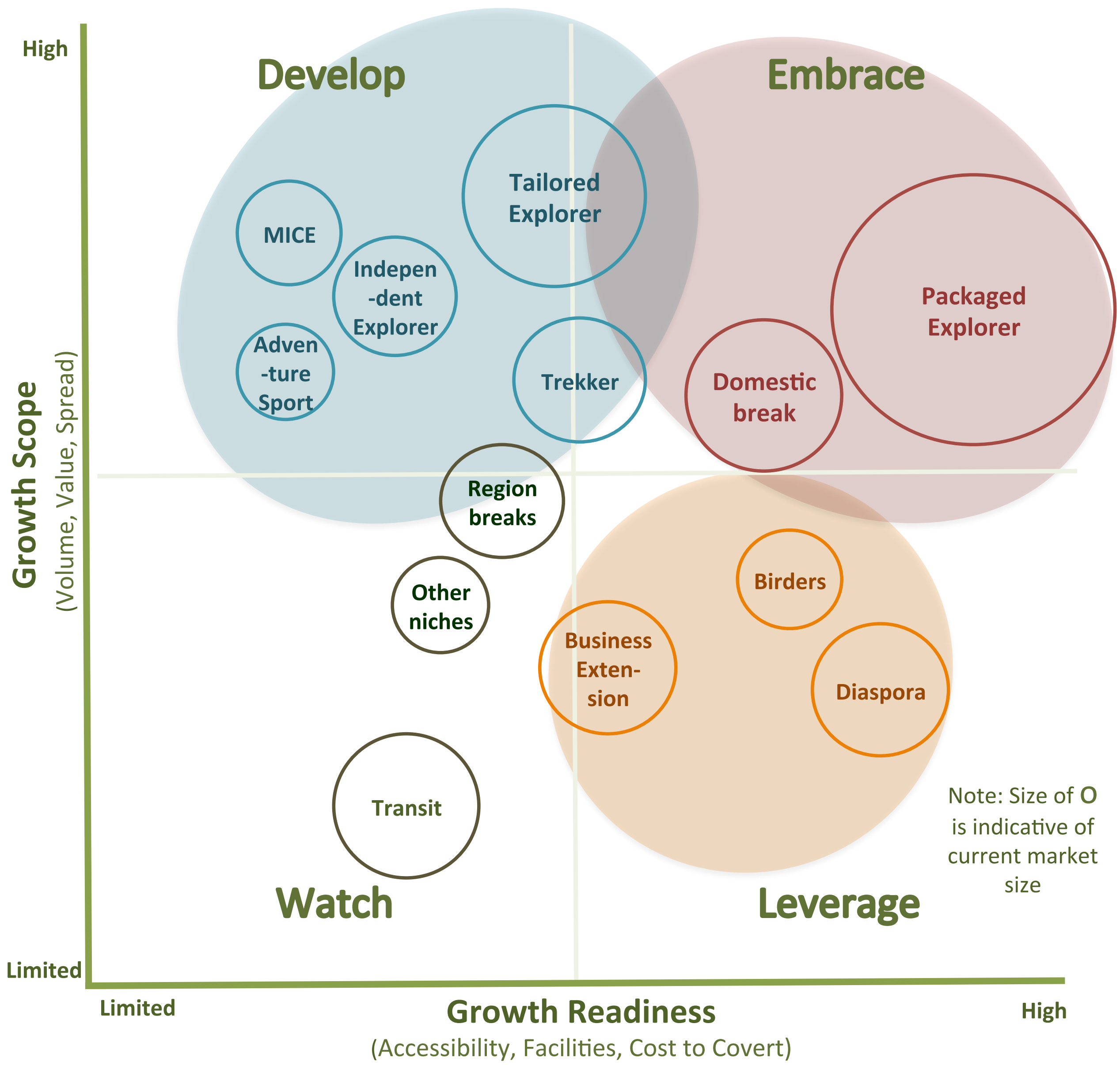
PRIORITIES	COUNTRIES	STRATEGY	PROMOTION APPROACH
Core markets High value potential, an affinity for leisure travel to Ethiopia and are easier and less costly to penetrate	• UK • Germany • France • Italy • USA (East and West Coast areas) • Saudi Arabia (Middle East climatic summer resort breaks) • Ethiopia domestic	**Capture** Focus most promotional activities here in the short and medium term Apply 70% of marketing resources	Apply the full promotion mix including: • A major PR and media drive • Strong digital advertising and social media focus with matching language content • Attendance of suitable travel trade and consumer fairs • Major trade education and joint promotions drive with inbound and foreign operators • MICE sales and trade fairs • Selective consumer advertising These are priority markets for establishing ETO in-market representation
Potential growth markets High value potential, low incidence of leisure travel to Ethiopia and more difficult and costly to penetrate	• China (focus on '2nd wave' experiential travellers) • Japan • Australia • Canada	**Invest for growth** Focus some promotional activities here in the medium term towards growing these into the core market portfolio in the longer term Apply 20% of marketing resources	Selective activities e.g.: • Selective travel trade and media education and familiarisation program • Selective travel trade joint promotions with inbound and foreign operators • Major online drive through language content expansion (China, Japan) and suitable social media channels ETO to engage in promotional activities with Ethiopian Diplomatic missions and Ethiopian Airlines in these markets
Steady markets[10] Lower value potential, an affinity for leisure travel to Ethiopia and are easier and less costly to penetrate	• Benelux • Sweden/ Norway • Switzerland • Sudan • Kenya • Djibouti • Israel	**Maintain** Focus limited promotional activities here aimed at increased penetration by strengthening existing travel trade relations to ensure expansion and deepening of packages Apply 10% of marketing resources	Mainly information provision and education, including: • Providing Africa-focused and special interest travel trade with product updates and information • Leveraging suitable online channels and content to make it easy for travellers to access information online Communication with travel trade in collaboration with local inbound operators and via diplomatic missions in these markets
Opportunity markets Lower value potential, low incidence of leisure travel; more difficult to penetrate	• India • South Africa • Russia • Nigeria • Brazil • Korea • UAE	**Watch** Leverage ad-hoc marketing opportunities Use spare resources only to support partners	Marketing activities will depend on the nature and extent of opportunities that emerge

[10] Benelux and Scandinavia (as collectives) are attractive markets and could move to core markets should resources allow

Target segments

Various current and potential market segments were identified through focus group discussions, tour operator interviews, desk research and stakeholder workshops. These were evaluated based on their indicative scope for growth (in terms of value, volume and ability to spread tourism around) and Ethiopia's readiness for such growth in terms of access to experiences, tourism facilities for these segments and cost of reaching them. Priorities are presented as follows:

Fig. 5.4: Target Market Segments and Approaches



The following marketing approaches are recommended for the various segments. Detailed profiling of each market segment, including demographics, travel desires, main interest and locations in Ethiopia and awareness and booking channels is attached as *Addendum B.*

Market segment and profile	Marketing approach
'Embrace' segments (high marketing investment)	
Packaged explorer: Cautious 'soft' exploration as part of a packaged group tour, visit mainly the key cultural and historical attractions on the traditional northern and southern circuits and sites	Apply a full mix of promotional elements and focusing on media awareness, travel trade education and promotion
Tailored explorer: Confident 'soft' exploration on a tailor-made itinerary, want to delve deeper and veer off the traditional circuit based on personal preference, organised, with some local interaction	Focus on specialist travel trade and media education and promotion and increased online media exposure
Trekkers: Always in search of new mountainous and other topographical, exotic landscapes to hike like Simien Mountains, Bale Mountains, Gerhalta, etc. (See *Addendum E*)	Focus on education and promotion to specialist trekking and hiking operators and online media exposure in outdoor publications and online hiking platforms
Domestic and regional breaks: Affluent locals and expatriates taking weekend and short breaks to spend quality time relaxing	Develop special price packages for the domestic market, packaged and sold by private travel agents, tour operators and suppliers. Use full promotional mix including TV, print and online media
'Develop' segments (medium marketing investment)	
Intrepid explorer: Confident 'hard' exploration on a flexible, largely independent itinerary and in search of extraordinary experiences - prepared to sacrifice comforts to go to less visited places experiences	Major focus on online, digital communication and leveraging social media, communicate exceptional 'stories', sites and experiences
MICE: Meet and discuss with colleagues issues of mutual concern, in a professional and interesting environment with opportunities for local, high quality experiences. Mainly Addis Ababa (see *Addendum D*)	Focus on engaging conference buyers, associations and conference organisers to create awareness of Ethiopia as MICE destination Create an online inventory of venues, services
Adventure sport enthusiasts: A collective segment of specialised niche adventurous outdoor sport enthusiasts, e.g. cross-country and endurance running capitalising on Ethiopia's celebrity athletes and could be expanded to cycling, motorcycling, mountain biking, over landing, climbing, canoeing or kayaking.	Major focus on online, digital communication and leveraging social media; communicate exceptional sites for various activities; engage with associations and clubs
'Leverage' segments (lower marketing investment)	
Birders: Focused travel to see endemic species (and other bird species) and adding them to personal birding lists. Simien and Bale Mountains, Awash National park, Lakes of the Rift Valley (see *Addendum E*)	Focus on extending the stay into other areas and non-birding destinations. Communication via birding operators and exposure on online birding sites and social media platforms
Business extension: Extending the primary business trip to experience Ethiopia's leisure attractions	Focus on extending the stay into leisure tourism areas. Communication via business chambers and larger corporates
Other niche segments: Various small segments of specialists visiting Ethiopia for its unique features in particular areas like antiquities, religion and pilgrimage, archaeology, palaeontology, geology, anthropology, art, etc.	Provide information on the official website and empower and educate staff to be able to support special interest practitioners and visitors with advice and information. Do this in collaboration with academics and specialists

5.4 Products and experiences that match market needs

Figure 5.5 below indicates the appeal of experiences and attractions for the various target market segments. Overall, the following patterns are evident:

- *Historical sites and structures* appeal strongly to all three Explorer market segments, based on the fact that the archaeological sites, churches, monasteries, mosques and rock-hewn churches offer opportunities for both 'hard' and 'soft' exploration
- *Eco and environmental attractions*, especially the scenery, mountain hiking, unique wildlife species and unique landforms appeal across a range of more active market segments and are especially attractive to Intrepid Explorers and Trekkers
- While general *cultural interaction* appeals across all segments, 'deeper' cultural experiences like tribal traditions, community-based tourism experiences, interactive food and coffee experiences, craft heritage etc. have high appeal for Intrepid Explorers and significant appeal for Tailored Explorers
- *Lifestyle and entertainment* experiences are of specific importance to the Domestic and Regional short-break market but appeal also to the Tailored Explorer market.

From a target market perspective the following product approaches are recommended:

<table>
<tr><th>Market segments</th><th>Product approach</th><th>Experiences and sites</th></tr>
<tr><td>Packaged Explorers</td><td>Focus on visitor convenience, management and interpretation at key historical sites on the traditional circuit
Ensure visitor safety e.g. walkways, viewing platforms, safety railings, etc.
Promote investment in tourist class hotels, guest houses and other facilities
Improve visitor facilities at key sites (toilets, curio and snack shops, shaded seating, etc.)
Improve visitor management e.g. information, ticketing, capacity management and impact monitoring</td><td>Northern areas
Monasteries on Lake Tana, the Blue Nile Falls and surrounds
Gondar and surrounds (Guzara, Gorgora & Falasha village)
Simien Mountains National park
Aksum and surrounds
Lalibela and its surrounding rock churches
Debre Libanos Monastery
Southern areas
Arbaminch area (Nechisar NP and Lake Chamo)
Dorze village
Konso cultural Landscape
South Omo ethnic groups
Eastern areas
Harar (Jogol) and Dire Dawa</td></tr>
<tr><td>Domestic Breaks</td><td>Focus on entertainment, relaxation and socialisation
Promote investment in domestic resort areas
Develop a calendar of events, stimulating the development of sport and entertainment events (music festivals, running, cycling, food festivals, etc.).
Develop picnic and camping areas</td><td>Bahir Dar and Lake Tana
Bishofto, Lagana and other lakes
Mekele City and museum</td></tr>
</table>

<table>
<tr><th>Market segments</th><th>Product approach</th><th>Experiences and sites</th></tr>
<tr><td>Tailored Explorers</td><td>Focus on diversifying the range, quality and depth of experiences on offer
Expand investment in higher-quality hospitality facilities services at key sites
Improve quality of transport and hospitality services at key sites, also outside the main circuit e.g. Harar, Bale Mountains, Omo Valley, Western Ethiopia, Afar, etc.
Major focus on improved interpretation, guiding and personalised services</td><td>Experiences for Packaged Explorers plus:
Northern areas
Kossoye area
Ankober Area
Auramba community
TESFA community tourism, North Wollo[11]
Village tour in Simien Mountains
Al – Nejashi tomb and mosque
Mekele City and Museum
Danikel and Afar
Southern areas
Rift valley lakes
Bale Mountains National Park and Harenna Forest
Lake Hawassa birding area
Community-based tourism e.g. Wenchi community tourism, Dorze weavers and potters project, Lake Ziway community tourism, etc.</td></tr>
<tr><td>Intrepid Explorers</td><td>Focus on packaging extraordinary experiences and circuits, especially environmental and cultural
Major drive to support and improve the extent and quality of community-based tourism
Develop and package experiences and circuits beyond the known areas
Critical to retain authenticity of experience</td><td>Experience for Packaged and Tailored Explorers plus:
Northern areas
Community tourism around Adigrat and Gerhalta
Atsibi cluster of rock churches
Lesser explored areas of the Danikel and Afar
Southern areas
Sof Omar cave and other cave systems
Yabello wildlife sanctuary
Borena Dublock singing well
Stele's (Tiya, Tutiti and Tutifala)
Adaba – Dodola community tourism
Western areas
Jimma and Kafa (coffee area)
Various lesser know national parks e.g. Borena Sayint, Abiata-Shala, Nechisar, Gambela, Babile elephant reserve, etc.
Benishangul traditional gold mining
Somali</td></tr>
<tr><td>Special interest markets: Trekkers,</td><td>Focus on packaging special interest experiences and improved community</td><td>Northern areas</td></tr>
</table>

[11] Tesfa Tours works with around 12 communities in North Wolo and has developed a trekking programme for tourists who wish to get off the beaten trail, trek on foot or on horseback in breathtaking scenery and experience the real culture of the highlanders by staying in guesthouses owned and operated by community members

Market segments	Product approach	Experiences and sites
Birders, Adventure Sport Enthusiasts	*hospitality* • Diversify trekking routes and improve trekking lodges, guide services, local community hospitality • Develop bird hides and promote community bird guiding • Develop and support adventure sport events (long-distance running, rafting, cycling, rally's, etc.) • Identify and package adventure activities including guide training, safety measures and guidelines, etc.	○ Simien mountains trekking trails ○ Gerhalta and Adigrat trekking area ○ Wanzaye Hot Spring and birding site • Southern area ○ Bale Mountains and Adaba-Dodola mountain trekking ○ Negele Borena birding area ○ Gibe Valley birding site ○ Wondo Genet birding site ○ Omo National Park ○ Mago National Park • Chebera Churchura National Park • Yirga Chefie and Yirgalem coffee area
MICE	*Focus on building capacity for hosting and expanding the MICE industry* • Marketing focus on existing international convention centre facilities, such as UN and AU, e.g. UN Economic Commission for Africa Conference Centre, African Union HQ and Conference Centre, and private conference facilities in hotels • Support development of the planned AAICEC international convention centre • Establish a dedicated MICE desk within ETO followed by a specialised Convention Bureau at a later stage • Create initial MICE marketing collateral in the form of an online directory of meeting venues in a MICE drop down menu on the ETO website • Invest in capacity building and training to ensure professional services, advice and support	• Addis Ababa • Bahir Dar • Bishoftu

Fig. 5.5: Matching Target Market Segments and Tourism Products

Segments and Strategies	Touring			Special Interest			Business		Relax
Products	Package Explorer	Tailored Explorer	Intrepid Explorer	Trekker	Birder	Sport Adventurer	MICE	Business Extension	Domestic /Regional break
Heritage and history									
Historical sites and structures	●	●	◕	◑	◑		●		◑
Churches, monasteries mosques	◕	●	●	◑	◑		●		
High rock churches		◕	●	●		◕			
Eco Environment									
Scenery	●	●	●	●	◕	◕	●		●
Mountain activities	◑	◕	●	●	◑	●			◑
Unique wildlife species	◑	◕	●	●	◕	◑			◑
Unique landforms/ Danikel		◑	●	●		●			
Bird experiences		◑		◑	●				
Rift Valley Lakes	◑	◕		◑	◑	◑	◕		●
Waterfalls			◑	◑					◑
River experiences						◕			
Culture									
General culture and lifestyle	●	●	●	◕	◑	◕	●		◑
Tribal traditions	◕	◕	●						
Community based tourism		◑	●	◕		◕			
Food and coffee experiences	◑	◕	●	◑		◑	●		◕
Craft heritage		◑	◕	◑			◑		
Struggle history			◑						◕
Lifestyle									
Shopping	◑	◑					◕		●
Spa and wellness		◑					●		●
Museums	●	◕					◑		
Nightlife	◑	◕	●				●		●
Organised leisure events	◑	●	◕	◑		●			●

Depending on interest, across leisure segments

Key: ● Very high appeal ◕ High appeal ◑ Moderate appeal Blank = Limited or no appeal

6 Execution Programs

The strategic vision and foundations outlined above will be executed through a suitable marketing mix that is anchored in the positioning and brand and speaks to the target markets.

Marketing execution will be conducted through a portfolio of *five key marketing programmes*, namely:

1. **'Encounter The Origin'** overarching destination marketing campaign

   A three-year, multi-channel international and domestic promotional campaign, used as an umbrella call to action and communication theme.

   Key elements: Creative campaign imagery applied to all visuals, website improvements, multi-faceted digital and social media development drive, travel trade education and joint marketing initiatives, media 'stories' initiative, domestic promotion, events support.

2. **'Great Origin Routes'** product packaging and improvement program

   Development and packaging of core touring routes and sub-routes based on the main traditional circuit, complemented by a range of themed sub-circuits and routes to appeal to the various market segments.

   Key elements: Identifying the core routes and complementary themed routes, auditing routes, mapping routes online and in print, forming route forums with local stakeholders, improving facilities and services on routes.

3. **'Tena Yistilign'** local tourism awareness program

   An internal awareness and capacity building program to prepare and sensitise the tourism industry and communities for welcoming visitors and raising the level of tourism awareness and knowledge.

   Key elements: Service quality awareness and training program, local interpretive guide training program, national tourism awards.

4. **'Ethiopia 'i' Network'** visitor information services improvement program

   A visitor information improvement program to ensure availability of high quality, well-branded and comprehensive visitor information online, in print and at information offices.

   Key elements: Audit and consolidation of existing information print materials, Visitor Centre (VC) classification and improvement program.

5. **'Meet Ethiopia'** MICE development and promotion program

   A programme to optimise the power of Meetings, Incentives, Conventions and Exhibitions, especially given the gateway status of Addis Ababa.

   Key elements: Strengthening convention capacity in ETO, various MICE promotion activities.

These execution thrusts are presented as follows in relation to the brand and target markets outlined in the previous chapter:

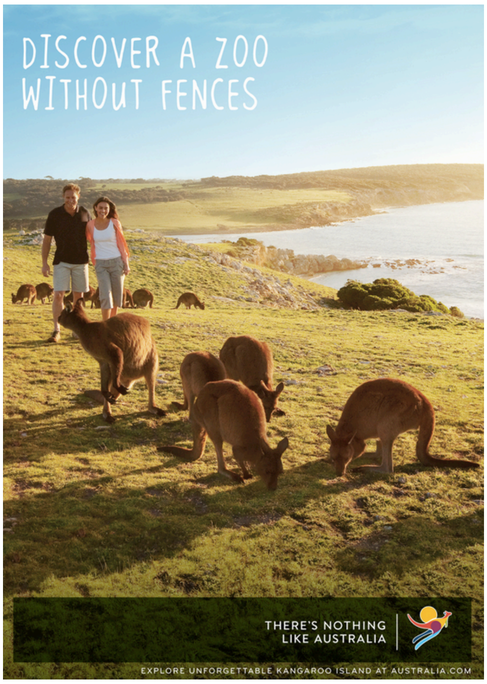
Fig. 6.1: Five Building Blocks for Executing the Strategy

6.1 Encounter the Origin destination marketing campaign

Concept Rolling out the 'Land of Origins' brand identity through a multi-year, multi-channel international and domestic promotional campaign called 'Encounter the Origin' and used as an umbrella call to action and as a communication theme for all tourism promotion activities

Case example There's Nothing Like Australia

'There's nothing like Australia' was designed to be long lasting and flexible, a campaign that could be updated as necessary to stay relevant in a highly competitive and fast-changing global tourism environment. In what became one of the country's biggest consumer- generated promotions, Australians responded by uploading nearly 30,000 stories and photos to www.nothinglikeaustralia.com. These stories now sit within an interactive, digital map of Australia. It has so far been used by 180 of Tourism Australia's partners including airlines, State and Territory Tourism Organisations, and the private industry.



The campaign creative focuses strongly on the digital, social media and advocacy channels that have become so central to holiday planning. In addition to Tourism Board promotions the campaign relies heavily on partnerships with travel trade and media partners and campaign tools include a downloadable campaign logo, library of downloadable still images and video footage, digital screensavers and wallpapers, posters that can be downloaded and printed, e-newsletter template, a campaign content widget that can be inserted on operator websites, digital postcards, etc.

Although Ethiopian tourism is not as mature as Australian tourism and the ETO's budget is significantly smaller, the concept of rallying the industry behind a common message is equally applicable and many 'below the line' promotion activities applied in the Australian campaign are affordable and relevant to Ethiopia.

Elements

1. ***Campaign creative design and production***

The 'Encounter the Origin' campaign should build on 'Land of Origins' brand identity and specific promotional tools should be designed and produced for application by the ETO, Regional Culture and Tourism Bureaus and public and private partners. These could include:

- A campaign logo and 'look and feel' design, in support of the national brand identity, which should be distributed widely to industry partners
- Development of a suitable suite of excellent national and regional destination websites and social media accounts with campaign imagery reflected (*see Addendum C and point 3 below*)
- Campaign branded exhibition stands for major fairs
- Downloadable screensavers and wallpapers
- Campaign stand-alone desktop, floor and window displays for use by trade partners
- A downloadable still image and video library

2. *Major online marketing drive*

Addendum C contains comprehensive details regarding the proposed online marketing drive, which can be summarised as follows:

a) Phase one: Setting up appropriate tools for online destination marketing. Currently the design quality, content and functionality of national and regional tourism websites are not up to standard and before engaging in an online marketing drive these need to be improved and established. This will include:

- *Creating excellent national and regional websites* as digital focal points for destination marketing, including email marketing and social media, with synergy of design, SEO optimisation and content between the national and regional websites. Care should be taken to use consistent spelling when translating to English, for optimising SEO. *Addendum C* outlines critical success factors within DMO websites that should be followed in the development of these websites
- *Creating and populating national social media accounts*, for personal sharing and interaction in Ethiopia's key source markets. These could include Facebook, Twitter, YouTube, Instagram and a Blog. It is envisaged that this may be outsourced to an external specialist consultancy in the first phase to meet the critical success factors outlined in the *Addendum C*
- *Creating and growing both a trade and consumer digital database* for email marketing with newsletter sign-up functionality on official websites indicating areas of interest. The database should be segmented appropriately so that targeted content can be created for specific traveller interests
- *Engaging in a content drive and partnerships* with influencers, travel rating platforms such as TripAdvisor and digital ambassadors such as travel bloggers to devise brand-appropriate, high quality content for all online platforms and pages in languages of the target source markets. This content can be repurposed for multiple platforms: Create once, reuse often.
- *Building online marketing skills and capacity* in ETO and the Regional Bureaus. KPIs outlined in *Addendum C* should be introduced and matched to clearly defined roles and responsibilities, with consistent reporting against these objectives
- *Providing Wi-Fi in key tourist areas*, where possible to encourage User-Generated Content. It is recommended in *Addendum C* that free Wi-Fi access be provided in in key tourist areas

b) Phase two: Engagement and Promotion. Once online marketing tools (especially websites and social media platforms) have been established proactive online marketing will be pursued. This will include:

- *Digital marketing campaign 'Encounters'* in support of 'Encounter the Origin' campaign, aimed at creating awareness about, and encouraging travel to Ethiopia's Great Origin Routes, including:
  - a special '*Encounters'* landing page on official websites
  - creating and using the hash tag #EncounterTheOrigin
  - enlisting travel bloggers to experience and blog about The Great Origin Circuit
  - promoting special online travel packages with online fulfilment partners
  - promoting online sharing at key visitor sites, where there is Wi-Fi hotspot access
  - creating an *'Encounters'* Facebook application as a game or competition
  - launching of '*Encounters'* across all relevant social media platforms
  - engaging global influencers to experience *'Encounters'* and share with their networks
- *Leveraging online marketing trade partnerships, including:*
  - an updated and maintained trade database in key source markets
  - a business-to-business (B2B) campaign section on both the national and regional websites providing a *destination marketing toolkit* that Ethiopia stakeholders, including

tourism suppliers, can use to market the destination across their own platforms
    - regular newsletters with updated campaign news
    - joint marketing arrangements encouraging key trade partners to promote 'Encounter the Origin' and share destination content across their digital marketing platforms

- *Developing mobile application technology to promote the destination* incorporating the critical success factors required for a high quality mobile app
- *Domestic digital destination marketing campaign* leveraging the world-renowned ambassadors and national pride of the Ethiopian nation. The campaign outlined in *Addendum C* suggests leveraging private-sector social media accounts with an engaged Ethiopian audience and the use of the #ExploreEthiopia and #VisitEthiopia hash tags that are already prolifically used

c) *Phase Three: Leveraging Affiliates.* Engagement with suitable third party partners could become a powerful way of spreading the campaign message. This will include:

- *Creating affiliate partnerships* with travel planning and booking channels like TripAdvisor, WAYN.com and Expedia
- *Commissioning online PR* incorporating Travel Bloggers with strong networks in key source markets
- Join the Destination Marketing Association International and leverage best-practice DMO trends

3. Travel trade promotion

The 'Encounter the Origins' campaign will draw heavily of travel trade relations and a travel trade promotion and sales drive will be undertaken in both 'Core' and 'Investment' markets including:

a) Exhibiting at Trade Fairs

The increasing status and power of the World Wide Web and other communication technologies such as VOIP, email, cellular telephones, video conferencing, etc. has in recent years largely reduced the necessity of face-to-face sales meetings with key trade partners. Many of the smaller foreign operators have also been usurped in recent years by the bigger conglomerates resulting in fewer, but more powerful buyers. Tourism suppliers and destination marketing bodies often leave exhibitions with feelings of frustration at the limited number of serious, new business generated. A focused trade fair strategy is recommended and based on the target market strategy contained in Section 4.3 it is recommended that the following travel trade fairs be supported and attended during the period of the marketing strategy:

- WTM – London (current)
- ITB – Berlin (current)
- Top Resa – Paris (add, France is a leading leisure market)
- COTTM – Beijing (current)
- Special interest consumer exhibitions for specialised tour operators and product owners (see *Addendum E*)

The following guidelines should be applied to exhibition attendance:

- Exhibitions should be an integral part of the 'Encounter the Origin' mix and should not be treated as separate or ad-hoc initiatives. The timing, design conceptualisation and communications pertaining to exhibitions should be planned to maximise the promotional value of the integrated promotion campaign
- Adequate background research should be conducted to establish the nature, quality and potential of trade and consumers attending exhibitions and where possible partnerships could

be formed.

- Product 'clubs' could be established for attending special interest exhibitions, with product owners and tour operators joining forces to exhibit and promote such themes on a co-funded basis
- Adequate preparation should precede attendance of fairs. Preparation meetings should be held with Ethiopian exhibitors to ascertain how best the specific fairs can be leveraged and how ETO can assist the private sector in making most of their investment
- Clear, measurable goals (e.g. business procured for Ethiopia, travel trade agreements concluded, media exposure achieved, etc.) should be set for each exhibition and the results should be measured accordingly
- Customer relationship management (CRM) possibilities should be optimally leveraged and adequate details and profiles should be obtained and logged on a database, with proactive communication and feedback following the fairs. Several open-source CRM software platforms are recommended in *Addendum C*, the most suitable being Sugar CRM for its ability to be customised for the specific requirements of ETO

b) Travel trade relations

One of the keys to success for the promotion campaign will be retaining and broadening appropriate trade distribution channels in support of the product development and promotional concepts proposed above. ETO will place a high value on striking up lasting relationships and partnerships with channel operators.

The following are guidelines in this regard:

- *Investment in Joint Marketing Agreements* will be actively pursued with tour operator partners in core markets to promote the 'Encounter the Origins' campaign. Such agreements should be clearly contracted and agreed upfront. For example, a 'heads of agreement' should be drafted, spelling out the contributions of each party and how it is to be invested and monitored. The ETO's investment in trade partnerships should preferably entail tactical activities e.g. online marketing drive, advertising, direct mail and email, distribution of flyers of special offers, etc. The impact of these should be closely monitored and measured. Investment in operator brochure pages, brochure advertisements and other initiatives that are essentially the corporate responsibility of trade partners should be avoided

- *Capacity building of inbound Ethiopian operators,* who are in the best position to on-sell travel experiences domestically and to their international partners. Inbound operators will be supplied with campaign marketing collateral and travel trade educationals will be arranged for inbound sales agents to experience the product first-hand

- *Road shows and workshops*: The aim will be to arrange a series of travel trade workshops in each core market every year. A program of trade road shows and workshops will preferably be arranged before and/or after attending trade fairs to brief the major operators in target markets about the destination and experiences they could sell. Sales and promotion workshops should make a point of displaying and exuding the man brand identity through appropriate decorations, entertainment, music food, etc.

- *Trade familiarisation visits:* As part of the 'Encounters' campaign ETO will work with Ethiopian Airlines to host selected international operators on familiarisation visits to Ethiopia. Consideration should be given to arranging one mega familiarisation trip (travel academy) per year to coincide with a significant event such as the opening of a major hotel or resort complex, convention facility, airport expansion, etc. Such mega event should include well-organised business-to-business workshops and meetings as part of the program, involving a spectrum of Ethiopian suppliers and tour operators

- *'Lucy's Friend' travel agent affiliation program*: ETO will launch an online education program for the international travel trade, with high quality destination information and fact sheets, allowing travel trade partners to complete a knowledge program and a simple test to be registered as a 'Lucy's Friend' and specialist in selling Ethiopia. A good example is the 'Aussie Specialist' program, consisting of 4 online travel trade training modules and a multiple-choice test, for which agents have to score at least 85% (http://www.aussiespecialist.com/About.aspx)

4. Media and public relations drive

Together with online marketing effective media and stakeholder communication should provide ETO with excellent returns on its marketing investment. The following actions will be undertaken:

- *Press kit:* ETO will compile a compendium of media information for distribution to travel media, on a flash drive or preferably on the website or a cloud-based file-storage platform where it can be easily accessed. The kit will include a series of destination articles and fact sheets in support of public relations and communication initiatives

- *Celebrity stories*: Ethiopia has produced many celebrity athletes, models, business people, etc. Their inspirational stories and passion for Ethiopia need to be told and ETO will launch a vibrant destination blog to carry the stories of high profile Ethiopians and their views on Ethiopia as a tourism destination. From here it will be shared with traditional and social media platforms

- *Media releases:* ETO will issues at least two international and local media releases per month in support of the 'Encounter the Origin' campaign to establish and maintain media awareness of tourism related developments and events in Ethiopia. The following guidelines pertain:
    - ETO will compile and build up an appropriate database of media contacts that will include print, radio, TV, online and social media contacts
    - Specialist PR capacity will be created in ETO to establish personal relations with travel journalists and to maintain continuity with information being distributed consistently to the same media person
    - Communication topics should ideally focus on newsworthy events and developments that support the brand of 'Land of Origins'
    - Corporate/organisational releases could be issued regarding ETO's progress and campaign successes
    - Consideration should be given to outsourcing to external specialists parts or all of the press liaison work

- *Travel press trips and editorial coverage:* A major emphasis will be placed on inviting and hosting high quality travel media to explore and report on their travel encounters with Ethiopia. Media will be hosted in collaboration with the private trade and regional offices and itineraries will be designed to suit their interests. International media representatives should be drawn from the core target markets, especially when celebrating special events. ETO will establish a specialised guest programmes unit to organise press trips and deal with travel media requirements

- *Tracking and measuring media value:* A key element of the media program will entail be to monitor media coverage following media interactions and to measure the results of such coverage in key target markets, to quantify the return on investment (ROI) and act accordingly. Professional media monitoring services will be appointed on an annual contract for this purpose. Following any press trip, media coverage emanating from the trip will be tracked in association with the journalists hosted and through media scanning and measuring the monetary value of column centimetres of print coverage, blog value and/or airtime received. This will be compared to the cost of hosting the journalist

5. Domestic tourism drive

While awareness among Ethiopians of tourism opportunities, responsibilities and potential is still low all indications are that the disposal income among the middle classes is rapidly rising, which will translate in an increased ability to travel. There is a also a significant resident expatriate population in Ethiopia who are keen to travel the country. Domestic tourism is an important backbone of most national tourism sectors and is less affected by international market fluctuations. Travel knowledge of the country also instils a sense of national brand pride. For tourism to become a sustainable, integral part of the economy and to be recognised as a potential entrepreneurial of career opportunity, the levels of awareness and participation in tourism should be increased.

An overarching domestic tourism campaign in support of the 'Encounter the Origin' theme will be launched to stimulate travel among Ethiopians and foreign permanent residents. The name of the campaign should resonate with Ethiopians and will be decided through consultation and possibly a competition. A successful example of such campaign in a developing economy is the 'Sho't Left' domestic campaign in South Africa (www.shotleft.co.za).

The tactical actions of the Ethiopian domestic tourism campaign will be planned in consultation with the industry and could include the following aspects:

- Promotions could be focused on certain months of the year, e.g. the 'shoulder' seasonal months of May and September and launched at least six months in advance of the actual travel periods
- ETO will collaborate with Ethiopian Airlines, local accommodation operators, travel agencies, transport providers and others in coming up with affordable travel opportunities and offers for groups, families, etc.
- ETO in collaboration with the Ethiopian Broadcasting Corporation and other domestic media will launch a local public relations, editorial and advertising campaign to promote domestic travel opportunities (possibly in the form of a treasure hunt with good prizes) and to raise interest of the unique attractions of the country
- The Regional Culture and Tourism Bureaus will be given the opportunity of partnering ETO and/or launching their own sub-campaigns and/or marketing actions in support of the national campaign
- A "take-a-friend" campaign will be considered where locals are encouraged to travel their country but also to take along a friend or relative from abroad

ETO will consider outsourcing certain key aspects of the domestic campaign, playing the role of campaign leader, coordinator and manager.

6. Tourism events initiative

Ethiopia's traditional events are already major tourism draw cards and visitor numbers soar during

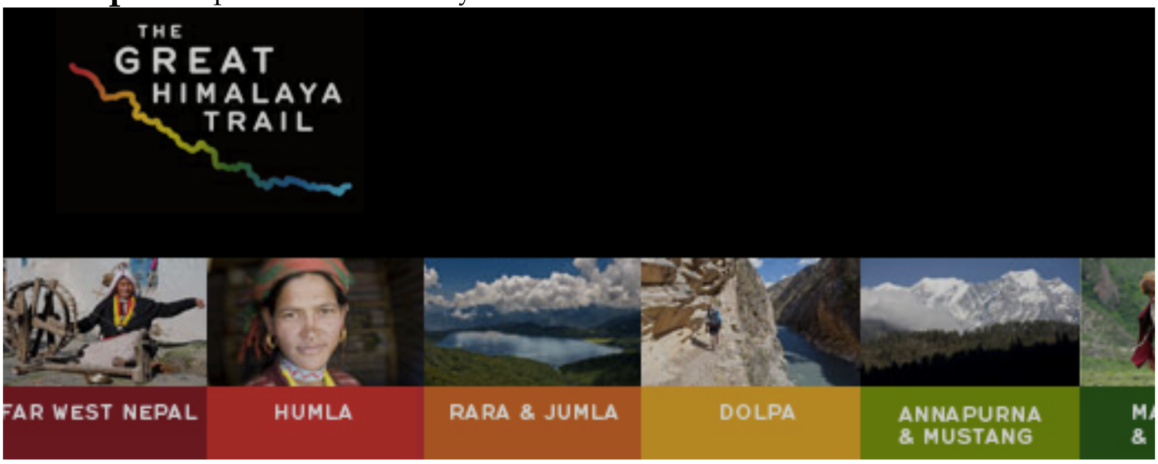
Timket, Meskel and other events. While these events will remain important, they are largely self-sufficient and their challenges are of a management rather than a marketing nature. Many other facets of Ethiopia's cultural and sport tourism product though, can benefit hugely from events to raise the demand and awareness of such opportunities. The following initiatives will be launched in this regard:

- *Calendar of events:* ETO will produce and update, in collaboration with the regional and local bureaus, a calendar of all events taking place throughout the year. This calendar will be part of the Ethiopia Tourism website (see 6.1 above) and will be communicated through media releases, the destination blog, social media and other promotional channels
- *Events support program*: ETO will provide event organisers of new, innovative events that complement the strategy with in-kind support, such as endorsement for sponsorships, permission to use the destination branding, public relations and media coverage and advice regarding local conditions that may affect the event. In time to come ETO may be in a position to provide brand-friendly events a 'flagship' status and some financial assistance. Priority will be given to events that have the potential to grow as flagship events with national and international status and that:
    - Leverage Ethiopia's special interest possibilities such as extreme running, hiking, mountain biking, triathlon, etc.
    - Promote Ethiopia's music and arts, both traditional and contemporary musical events and performances

6.2 Great Origin Routes

Concept Development and packaging of core ('spine') touring routes based on the main tourist sites of the northern and southern circuits, complemented by a range of regional themed sub-circuits and routes that branch off the main circuit and that appeal to the various market segments.

Case example Nepal's Great Himalaya Trail



The Great Himalaya Trail is a network of existing treks and trails, which together form one of the longest and highest trails in the world. Nepal's GHT has 10 sections comprising a network of routes (see www.thegreathimalayatrail.org), each offering something different, be it adventure and exploration, authentic cultural experiences, or simply spectacular Himalayan nature.

Elements

1. Conceptualising routes

The Great Origin Routes identification and mapping will be conducted in partnership with the Regional Bureaus. The core of the Great Origin Routes will be the traditional Northern and Southern circuits, including the main historical, cultural and environmental sites.

The *following routes will be prioritised* at national level, during the fist stage of routes development:

Route 1 - Addis Ababa and surrounds: Gateway to African Diplomacy

- Museums
    - Addis Ababa Museum
    - IES Ethnographic Museum
    - National Museum
    - Red Terror Martyrs' Memorial Museum
- Gullele Botanical Gardens
- Historic churches and Mosques
    - St George's Cathedral
    - Beata Maryam
    - Selassie Cathedral
    - Annuar Grand Mosque
- Markets and Shopping
- Cultural Restaurants and specialty restaurants
- Entoto Hills
- Tiya, Adadi Maryam & Melka Kunture
- Debre Libanos Monastery
- Bishoftu
- Born Free Sanctuary and Menegasha Forest

Route 2 - The Northern Route: Mountains and Empires

- Bahir Dar, Lake Tana and monasteries
- Blue Nile Falls and Blue Nile Gorge
- Gondar
- Simien Mountains National Park
- Axum
- Yeha temple
- Debre Damo Monastery
- Gerhalta and the rock-hewn churches of Tigrai
- Mekele
- Lalibela
- Other rock hewn churches, Asheten Mariam, Yimrihane Kristos cave church
- Bati and Senbete Markets
- Guassa Community Conservation Area and Ankober
- Al Nejashi and en route Adwa and the landscape from Debark to Axum

Route 3 – The Southern Route: Rift Valley Cultural Mosaic

- Central Rift Valley
  - Ziway
  - Langano
- Abijatta-Shalla National Park
- Hawassa
  - Incorporating Shashamene (Rasta community), Lephis Forest, Wondo Genet & Sankele Sanctuary
- Arbaminch/Nechisar NP and its environs
  - Dorze
  - Konso
- South Omo Ethnic Groups
  - Including 16 ethnic groups in Dabub (South) Omo Zone with diverse culture.
  - Include Omo, Mayo and Maze National Parks
- Dilla
- Yabelo National Park and its environs
- Yabelo Wildlife Sanctuary (for birding)
  - Including Garalle NP, the Gada system in Borena and Guji zones

Route 4 – The Eastern Route: Walled City

- Awash National Park
  - Including Bilen & Alledeghi & Yangudi Rassa
  - Lower Awash Valley WHS – origins of humanity and Lucy
- Danakil Depression
  - Erta Ale and Dallol and salt lake
- Dire Dawa
- Harar
- Babile Elephant Sanctuary
- Jigjiga
- Bale Mountain National Park
  - Dodola Forest Hikes and Sanette Plateau
- Southeast Birding Route
- Sof Omar and Sheik Dire Hussein

Route 5 – The Western Route: Coffee and Forests

- Ambo/ Mt Wenchi Crater Lake
- Asosa / Benishangul-Gumuz
- Jimma
- Chebera-Churchura National Park
- Bonga/ Kaffa (birthplace of coffee)
  - New coffee museum (to open soon)
  - Yayu, Shieka and Kaffa Unesco registered biosphere reserves
- Tepi
- Southwest Omo, Surma territory, west of Omo River
- Metu/ Sor Waterfall
- Gambella (town)
- Gambella National Park and Dedesa wildlife reserve known for hippos

It is envisaged that each region will eventually identify a number of sub-circuits to contribute to these main Great Ethiopian Routes[12]. The sub-circuits can be general touring routes or could appeal to specific interest groups. Importantly, sub-routes should not be constrained by regional boundaries and regional stakeholders will collaborate when routes cross regional boundaries.

2. *Route forums and auditing*

Route forums will be set up for each of the identified routes to coordinate activities of various role players involved in the development and promotion of the various routes. The forums will be led by ETO staff and will be comprised of the relevant regional Bureaus (as main champions), selected community representatives and interested and affected private stakeholders. Each route should have a 'route champion' who will chair the route forum and be the main liaison channel with the Bureau. An inventory will be made of attractions, experiences, facilities and services on each route and these will be evaluated in terms of facilities quality, safety, human resources capacity, etc.

A plan of action will be drafted for enhancement of experiences and facilities on the various routes.

3. *Route mapping and promotion*

The routes will be mapped on the destination website using intercative mapping functionality (e.g. www.namibiatourism.com; www.openafrica.org) and possibly on a printed Great Origin Routes Map, highlighting the experiences, facilities, services and activities available on each route. Printed route maps will also be downloadable from the ETO website.

The routes will be promoted through the 'Encounter the Origin' promotional campaign, including through travel trade and media famliarisation visits and on the various websites.

4. *Site and facilities improvement*

The route audits will highlight specific site improvements and developments to be given priority, including:

- "Hardware" improvements: physical works to improve tourism areas and experiences, such as access routes, parking, trails (for pedestrians, bikes and horses), improved tourism offices, observation platforms, safety railings, rest and shade areas, signposting, etc.
- "Software" improvements: putting in place organisational structures, services, interpretive guiding, etc. that can change a place into a package of experiences. This often needs engagement and stakeholder collaboration rather than capital investment, however the positive impacts can be significant
- Maximising market ready products: packaging and branding attractions and experiences so that a value can be attached to them and they can be promoted commercially

6.3 Tena Yistilign Ethiopia service quality drive

Concept An internal tourism awareness drive to raise awareness of the value and importance of good service in the tourism

Case example South Africa's Welcome Campaign

Welcome is a South African Tourism initiative that aims to create and sustain engagement with

[12] See regional marketing strategies for regional routes

industry stakeholders, and encourage them to strive for service excellence and extend to guests the warmest welcome (see www.welcome.southafrica.net). The initiative extends a hand to all role-players in the tourism industry, from seasoned tourism business owners to young, thriving start-ups. In addition to hosting industry workshops the initiative provides tourism operators with various tools to assist businesses in improving service levels and making sure that guests have the best possible experience in South Africa, and at the establishment level. This will ensure they have a special, meaningful experience. They will then want to return, and recommend the business (and South Africa) to their friends.

Elements

1. Tena Yistilign Service quality training program

A short frontline service-training program aimed at conveying basic principles of customer care to public and private sector tourism service providers. It will be aimed at key frontline personnel in tourism and related industries – e.g. emigration, accommodation, restaurants, tourism-related retail and entertainment, tour operators/guides, etc. Given the fact that Ethiopia is primarily a touring destination and that 'Land of Origins' brand relies heavily on guide communication and interpretation, a special focus will be put on improving the quality of local tour guiding skills.

The program will be operated in partnership with private and public tourism stakeholders and in designing it the ETO will draw on similar programmes elsewhere (UK, New Zealand, Canada, South Africa, etc.) to ensure its feasibility. Memoranda of Understanding (MoUs) with successful tourism countries should be leveraged to gain insights about best practices in this regard.

2. Tena Yistilign guide and language training academy

A training program for local guides and frontline service staff to ensure they have the knowledge and capabilities to 'tell the Ethiopian story'. Foreign language capabilities will be given priority and language training will be provided in association with foreign governments through organisations like Alliance Française, Goethe Cultural Institute, Italian Cultural Institute, etc. Language phrase books and mobile phone applications will be provided to guides and frontline staff.

In addition existing tourist guides will be trained in communication skills, storytelling and Ethiopian knowledge to be able to convey the facts, legends and 'spirit of originality' with inspiration and creativity.

3. Tena Yistilign Ethiopia Annual Tourism Awards

The main purpose of The National Tourism Awards is to reward service excellence and adherence to the call for tourism innovation and involvement. Entries will be through proposals and nominations and an independent panel will be appointed to evaluate proposals. To start off a limited number of categories will be introduced in support of the strategy thrusts, e.g. best frontline service persons in hospitality, emigration and commerce; best community-based tourism enterprise; tourism entrepreneur of the year; local tourism town of the year, etc. A celebrity awards 'patron' should be appointed and winners will be announced at a high-level awards event.

An example of such awards scheme is South Africa's Lilizela Awards (http://www.lilizela.co.za/)

6.4 Ethiopia Tourism Information Network

Concept A network and portfolio of tourism information offices and materials that display the brand and operate at a high-quality level

Case example New Zealand's i-Site Initiative

i-SITE is New Zealand's official visitor information network with over 80 i-SITEs nationwide (www.newzealand.com/int/ visitor-information-centre). i-SITEs know all the best things to do, places to stay and ways to get there. They also take care of bookings. Every person who works at i-SITE is a travel expert for their own hometown, so they can help visitors find the sort of activities, attractions, accommodation and transport that only a local would know. I-SITEs provide itinerary planning and information, accommodation, transport, activities, attractions bookings nationwide; Free maps, weather & mountain safety information and local information regarding events, attractions, restaurants, etc.

Elements

1. Portfolio of high quality marketing and information materials

The situation analysis found that Ethiopia's national, regional and local tourism offices produce a variety of printed information materials. The factual content of such materials is mostly good, however the target audiences and aims of the materials are not always clear and the portfolio is largely fragmented and visual images and designs are poorly executed. The growing importance of the Internet and websites is fast making marketing collateral redundant and ETO will in future mainly invest in digital marketing and information platforms *(see online marketing strategy*).

However print information will remain relevant for the foreseeable future. Funded by the 'production of marketing materials project' of the ESTDP[13], ETO and the regions will produce the printed and electronic promotion and information materials outlined below.

Type of materials	Description
National Materials (to be produced by ETO)	
Scheduled for production under the ESTDP project:	
Inspirational Flyer A4 folded leaflet; 100,000 units in 4 languages	'Teaser' flyer for mass distribution at promotional events, containing key reasons for visiting Ethiopia and eye-catching photographs
Inspirational brochure 32-page brochure; 60,000 units	A high quality, concise but glossy inspirational folder as motivational piece to create awareness, curiosity and interest in traveling to Ethiopia. It will have spectacular visuals to solicit

[13] The nature and extent of marketing materials outlined below was scoped and tendered out prior to the formulation of this marketing strategy

in 4 languages	interest in the destination during first contact discussions and display the brand in a creatively
Informative folders by tourism routes Folded leaflets for 5 routes; 15,000 units per route, 75,000 in total, in English only	Folders for Addis Ababa and surrounds, Northern Route, Eastern Route, Southern Route and South-Western Route to provide interested travellers with guiding information regarding key tourists sites: their locations, attractions, experiences, contact numbers for arranging and booking visits to such places
Informative folders by World Heritage Sites Folded leaflets for 9 sites; 1,000 units per site, 90,000 in total, in English only	Folders for Ethiopia's nine World Heritage Sites to provide interested travellers with guiding information regarding key tourists sites: their locations, attractions, experiences, contact numbers for arranging and booking visits to such places
Posters 12 Colourful Posters; 2,000 copies of each poster, 24,000 in total	Posters reflecting the World Heritage Sites and also Ertale Volcano, Danikel Depression and a major festival.
Image bank 300 high-quality photos	Collection of high quality images covering the key destinations, attractions and themes, including regions, routes, world heritage sites, main towns, national parks, food, crafts and facilities and services
Inspirational short videos Six Short videos of 3 minutes each and one 5-minute main video	Promotional videos covering key experiences offered in Ethiopia, by main themes and also covering the key travel destinations
Recommended print materials for future	
Ethiopia: Traveller Companion	A guide book with factual information on attractions, facilities, activities and experiences and that covers the key regions, routes, sites and provides information on facilities and services. Could be produced with a commercial partner and funded through advertising revenues
Ethiopia: Travel map	A comprehensive fold-out map that indicates key locations, attractions and distances with tourist information on the flip side of the map
Recommended regional materials (To be produced by Regional Culture and Tourism Bureaus with technical advice from ETO)	
Regional travel guide	Concise guide with factual information on key attractions, activities, routes etc. and indicating practical travel information such as locations, entrance times and costs, guide availability and costs, places to stay and eat, etc. Photography should be limited but of a high quality

Regional travel map	Each region should produce a fold-out travel map that highlights travel routings, driving times and distances, key attractions and provides information on unique features in the region and smaller maps of key city centres
Recommended local materials (To be produced by District and City Tourism Offices, with technical advice by ETO)	
Local city maps	A fold-out map that shows the city layout and includes information on key local sites, events, activities etc. as well as practical guidelines on local traditions, cultures, etc.

A distinction should be made between 'promotional' and 'informative' materials, the former being produced for enticing customers to Ethiopia who have not yet decided to visit the destination, while the latter is for equipping visitors who have already decided to travel or are already in Ethiopia and need the materials in planning their trip.

An important prerequisite is that all printed marketing materials should clearly complement the regional brand identities in design and identity. In this respect ETO, as brand custodian, will work closely with the Regional Bureaus to evaluate current marketing materials, redesign and/or phase them out as necessary.

2. *Network of branded Visitor Information Centres*

All Visitor Information Centres (VICs) in the country will carry a standardised national 'i' sign in support of the national branding. The i-Network branding and 'i' sign will be developed and monitored by ETO and the Regional Bureaus will apply the branding in their regions. VICs will be classified at three levels (See detailed classification guidelines in *Addendum G*), namely:

Type of VIC	Description
Gateway Centre Addis Ababa	The VIC in Addis Ababa as key entry point will provide information about the entire country and will carry all regional and local tourism brochures. It will become a one-stop information service and will include foreign exchange services, merchandising of Ethiopia-branded items, a small coffee shop etc. It should become a congregation point for visitors to the city and a meeting point for tour departures, etc.
Regional centre Regional Tourism entry hubs	VICs in the major regional centres that provide information about the broader region, which it serves Multi-functional hub for information, guide bookings, transport, etc.
Local Centre Town and community level	VICs at town or community level that provide information about the local area Local information and guide booking services provided

The i-Network implementation program will include:

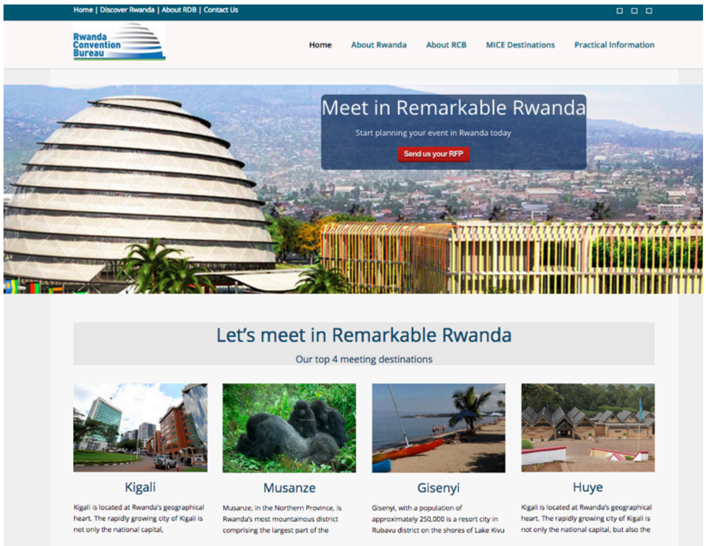
- Development of a set of standards for the various types of VICs and production of an Operating Manual for VICs explaining standards, roles, services, management processes and procedures, etc. This could be made available online through the industry section of the website or printed in handbook form

- Audit of staff capacity, knowledge and language and a training improvement program to address gaps
- A phased refurbishment program, modernising VICs with furnishings and technology to ensure they have the hardware, software and information databases to fulfil their functions

6.5 Meet Ethiopia

Concept A national initiative to promote Ethiopia and in particular Addis as destination for Meetings, Incentives, Conventions and Exhibitions (MICE) starting with a Convention desk and developing into a national Convention Bureau

Case example Recently established Rwanda Convention Bureau



Rwanda Convention Bureau (RCB) is a strategic business unit of Rwanda Development Board's Tourism and Conservation Department. Established in 2014 RCB promotes Rwanda as a premier destination and is a one-stop solution for assistance, information and neutral advice on hosting and organising MICE / business events in Rwanda.

Whether an international convention, association meeting, conference, incentive trip, or exhibition the RCB is there to assist conference organisers and associations with every step of planning for the event. Rwanda Convention Bureau is Africa's latest International Congress and Convention Association (ICCA) Member (see www.rwandaconventionbureau.rw)

Elements

A more comprehensive strategy for MICE promotion is attached as *Addendum D*. Two components will be implemented during the period of the strategy, namely:

1. Convention Desk

In the immediate short-term a dedicated MICE Desk, operated by a MICE Product Manager will be established within ETO with the objective of working towards the establishment of a more professionally driven international best-practice National Convention Bureau.

To start with the MICE Product Manager will facilitate the commissioning of a feasibility study and an audit of the destination to determine the future structure of the Convention Bureau. At the same time the Product Manager can focus on the development of the regional meetings and assist with a formalised marketing campaign in order to support efforts currently spearheaded by the United Nations Conference Centre as well as the African Union HQ and Conference Centre.

The National Convention Bureau, once established, will develop a stand-alone strategic MICE business plan for Ethiopia. Key performance areas for the MICE Product Manager desk in years 1 and 2 are outlined under MICE promotion below.

2. MICE promotion

A business tourism brand for Ethiopia will be crafted once the destination brand is concretised, and this will be followed by the development of a comprehensive sales and marketing strategy.

The promotion strategy will be implemented in two phases, namely:

Phase 1:

Years 1 and 2

- Feasibility study and destination audit of suitable venues, accommodation and services inventory
- Design the MICE brand / logo
- Communication development (website, printed collateral, PR)
- Engage with industry stakeholders to identify suitable operators and organisers to handle meetings, conferences and incentive trips
- Arrange familiarisation trips to potential meeting and incentive buyers
- Develop a marketing strategy to market and sell meetings, conferences and incentive and to package incentive and pre/post tour itineraries
- Initiate MICE market delegate research to better understand the sector and to take advantage of the opportunities presented
- Support the first MICE East Africa Trade Show to be hosted in Addis Ababa in early 2016. This is a first for East Africa, organised by a private sector company and will be endorsed and supported by ETO with marketing, publicity, hosting of meeting buyers and attendance of the show
- Attendance of trade shows along with the United Nations (Economic Commission for Africa) Conference Centre and African Union HQ and Conference Centre, e.g.:

  Meetings Africa, Johannesburg – annually in February

  IMEX[14], Frankfurt – annually in May

  IBTM[15] World, Barcelona – annually in November

Phase 2:

Years 3 to 5

- Join appropriate international industry associations (e.g. ICCA[16] and SITE[17])
- Focused effort to coordinate the MICE industry sector
- Professional development via mentoring and/or training of staff
- Develop a bidding strategy along with bid book and supporting collateral
- Develop Convention Bureau management tools (e.g. measuring the positive return-on-investment of hosting a meeting)
- Product packaging for meetings, conferences and exhibitions
- Develop an event strategy for the destination
- Develop a MICE database
- Attend trade shows
- Host site inspection / familiarisation trips for qualified meeting buyers

It should be noted that international best practice determines that a new convention centre (such as the planned AAICEC) should be taken to market a minimum of two to three years prior to opening.

[14] IMEX – The worldwide exhibition for incentive travel, meetings and events
[15] IBTM World – International business tourism market
[16] International Congress and Conference Association
[17] Society for International Travel Executives

7 Implementation

The vision, objectives and execution programs are ambitious and require a sensible and practical implementation approach. Five key approaches will be followed during the next five years, namely:

- A staged approach to implementation
- Strengthening ETO and regional institutional marketing capacity
- Forming a strong destination marketing partnership
- Securing adequate funding
- Effective monitoring and evaluation

7.1 A staged approach to implementation

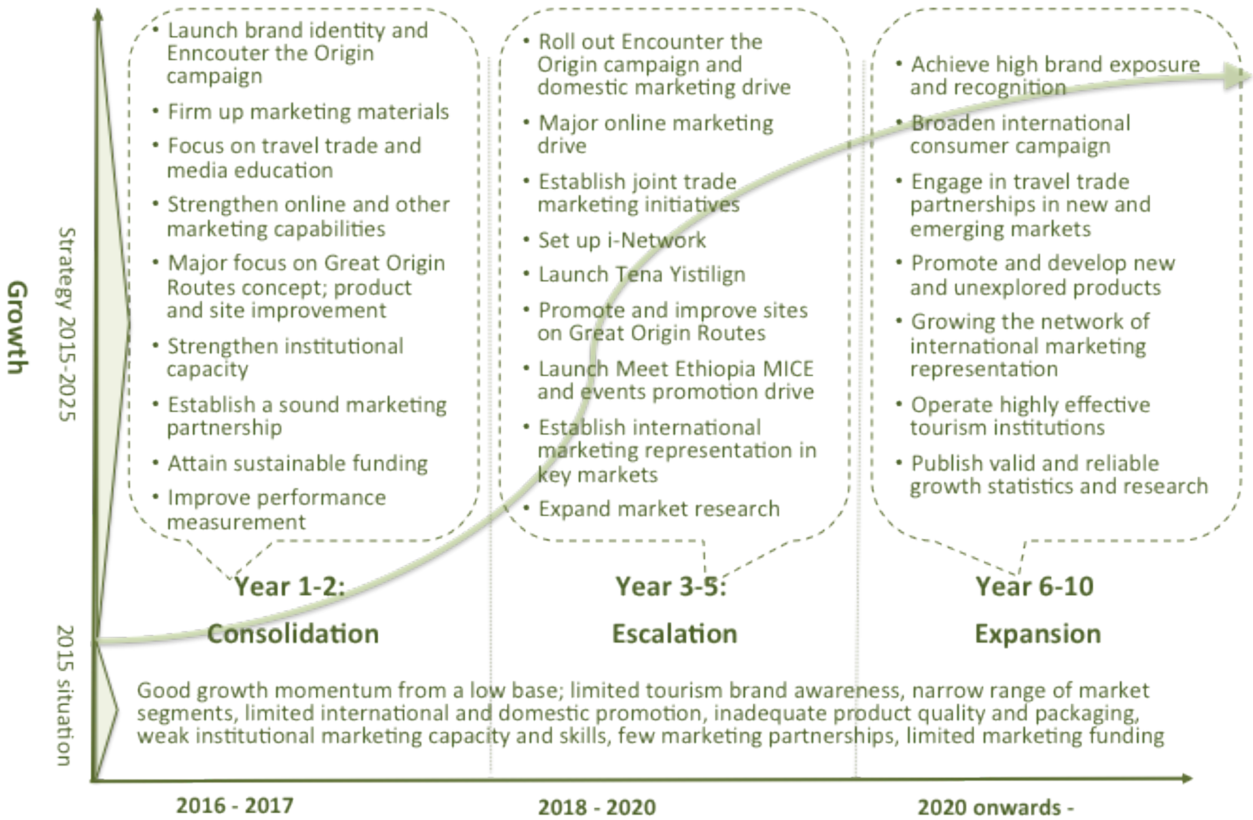
This five-year strategy aims to establish a sound marketing dynamic and to maximise Ethiopia's tourism revenues with a specific focus on the next five years. This should lay the basis and create a sustainable momentum for reaching the vision and growth objectives by 2025.

The tourism marketing strategy will be implemented over three phases, namely:

- Consolidation - laying sound marketing foundations (Years 1 and 2)
- Escalation - stepping up marketing implementation and market growth (Years 3-5)
- Expansion - achieving consistent high tourism growth (Year 6 and beyond)

Figure 7.1 below indicates the actions that will receive priority during the various stages of implementation.

Fig. 7.1: Conceptual Diagram of a Staged Marketing Approach



7.2 Institutional strengthening

The currently limited capacity and marketing skills at ETO and the Regional Tourism Bureaus present significant challenges for implementing the strategy. While it is not the mandate of this marketing strategy to evaluate and design the organisational structure of ETO and the Regional Tourism Bureaus, implementing the strategy will require excellent knowledge and specialisation in the following areas:

- Brand management and execution
- Digital marketing, especially in areas such as search engine optimisation, web design and branding, content production and management, maximising social media platforms, blogging, etc.
- Promoting MICE tourism
- Establishing and leveraging travel trade relations with foreign and local tour operators
- Leveraging travel media and public relations
- Project management and innovative product packaging

The following aspects should be considered in addressing these capacity challenges:

- *Appropriate structuring of ETO:* ETO's organisational structure, functional divisions and job descriptions will be structured in accordance with the strategy execution programmes. The following institutional roles and key performance areas will be addressed:

<table>
<tr><th>Key Performance Areas (KPAs)</th><th>Tasks</th><th>Institutional implications</th></tr>
<tr><td colspan="3">Strategic leadership
The strategic leadership functions will resort under the Office of the CEO, the strategic leader of the organisation. The following key performance areas, tasks and institutional units will resort under this function:</td></tr>
<tr><td>Strategy development, coordination and performance monitoring</td><td>• Formulating and regularly adapting the ETO marketing strategy based on market intelligence
• Ensuring synergy in executing strategy projects among ETO units (especially between promotion and product development)
• Monitoring strategy execution, progress and impacts on a regular basis, based on suitable indicators</td><td>The CEO will spearhead this function
Advisable to contract specialists for some elements of strategic advice</td></tr>
<tr><td>Marketing financing and fund raising</td><td>• Engaging the MoCT in understanding the strategy requirements, action plans and performance measures and motivating for adequate funds
• Researching and proposing suitable funding models
• Identifying suitable co-funding opportunities and negotiating funding partnership
• Identifying, investigating and executing income generating opportunities</td><td rowspan="2">A 'Stakeholder relations and partnerships' unit will be created to leverage public and private cooperative and financial partnerships with national, regional and private sector partners
A senior communicator, who is an experienced fundraiser and</td></tr>
<tr><td>Regional communication, coordination and partnerships</td><td>• Ensuring that regional Culture and Tourism Bureaus are well informed of ETO's programmes and projects, and visa versa
• Negotiating agreements with regional Culture and Tourism Bureaus regarding their participation in and support for ETO's programmes and projects</td></tr>
</table>

<table>
<tr><th>Key Performance Areas (KPAs)</th><th>Tasks</th><th>Institutional implications</th></tr>
<tr><td></td><td>• Monitoring regional participation in ETO’s programmes
• Conducting regular communication and coordination with Regional Culture and Tourism Bureaus</td><td rowspan="3">relationship manager should be appointed to head this function, with remuneration and rewards based on agreed financial and operational performance indicators

Limited support staff could be considered, complemented by external assistance</td></tr>
<tr><td>Corporate communications</td><td>• Communicating ETO’s initiatives, achievements and progress to key stakeholders, funders, etc.
• Monitoring stakeholder perceptions and awareness of ETO's programmes</td></tr>
<tr><td>Public-private stakeholder relations and partnerships</td><td>• Formalising agreements/memoranda of understanding (MoUs) with key public and private partners regarding joint marketing programs, projects and sponsorships
• Conducting joint planning and execution of marketing programmes together with partners</td></tr>
<tr><td colspan="3">Marketing
A key division of Tourism Marketing will be created to deal with all promotion matters at an overarching level. A senior, experienced marketer will head this function; if this is not a tourism expert advisory expertise will be contracted to advise on tourism marketing matters. The following units will resort under this function:</td></tr>
<tr><td>Brand management and execution</td><td>• Acting as the custodian and brand manager of ‘Ethiopia: Land of Origins’ brand
• Raising awareness and communicating the destination brand promise, essence, identity and rules to all interested and affected parties
• Developing the ETO corporate brand identity to be in synergy with the destination brand
• Spearheading application and roll-out of the destination brand within all elements of ETO
• Advocating brand application by partners at national and regional level
• Monitoring brand application and brand awareness and adapt ETO's approach accordingly</td><td rowspan="2">The Brand Management and Market Intelligence functions will be managed and executed by the head of the Marketing Division.

Various tasks, such as market intelligence management, could be outsourced under contract, managed by ETO marketing manager</td></tr>
<tr><td>Market intelligence management</td><td>• Conducting market research into target source markets and segments to ensure focused promotion and achieve the best possible Return on Investment (ROI)
• Ensure that all partners are aware of key market trends and profiles and incorporate these in their marketing programmes</td></tr>
<tr><td>International leisure promotion</td><td>• Directing and executing the ‘Encounter the Origin’ campaign
• Formulating an annual international promotion plan
• Liaising with and directing market-based representatives and foreign diplomatic missions
• Promoting Ethiopia to the international travel trade
• Promoting Ethiopia to the international travel media
• Initiating and arranging special promotions in key markets</td><td>A leisure tourism promotion unit will be established, and a small core of operational staff at head office will be responsible for directing promotion in key regional</td></tr>
</table>

Key Performance Areas (KPAs)	Tasks	Institutional implications
	and work with the online marketing specialists and other colleagues in executing these	markets e.g.: Northern Europe Western Europe Americas Asia and rest of the world Domestic Contracted professional Market-based Representatives (MBRs) will direct promotion in key international markets
Domestic leisure promotion	• Directing and executing the domestic marketing campaign in support of 'Encounter the Origin' theme • Engaging the domestic media (e.g. the broadcasting corporation and other key media) in promoting the campaign • Engaging the domestic travel trade (including Ethiopian Airlines, accommodation providers, etc.) in promoting special offers and price packages • Engaging the Regional Culture and Tourism Bureaus in extending the campaign through regional involvement	
MICE promotion	• Establishing a MICE desk, followed later by a Convention Bureau, at ETO • Developing MICE destination promotion collateral • Establishing a MICE supplier database and arranging marketing partnerships with Ethiopian convention facilities, accommodation providers, etc. • Promoting Ethiopia as a MICE destination to international MICE trade	A small, dedicated ***MICE promotion unit*** will be established as a first step towards an Ethiopia Convention Bureau. Key tasks will be outsourced
Online promotion	• Developing the official destination website and populating with suitable content in support of the strategy • Maintaining and innovating website content on an on-going basis • Setting up and populating social media accounts • Engaging with social media to attract a suitable Ethiopia following and leveraging earned media as best possible • Engaging Ethiopia fans, bloggers, etc. in covering Ethiopian tourism on social media • Formulating and publishing a regular destination blog and e-newsletter • Devising, launching and managing 'Encounters' online promotion campaign • Conducting tactical online marketing initiatives on request of international and domestic marketing campaign managers • Engaging regional Culture and Tourism Bureaus to ensure high quality regional websites and online information • Monitoring website and online marketing performance	A dedicated ***E-marketing unit*** will be created to spearhead online promotion A specialist in digital promotion should be appointed to head this function, which will be a priority focus area in ETO Hosting of the website, content creation and management, online campaigns and social media management could be outsourced

Product and human resources development

A ke*y **division of Tourism Development*** will be created to deal with all product and human resource development matters at an overarching level. A senior, experienced tourism development expert will head this function. The following key performance areas, tasks and institutional units will resort under this function:

Key Performance Areas (KPAs)	Tasks	Institutional implications
Visitor information management	• Researching and developing an inventory of destination attractions, facilities and services in consultation with regional Culture and Tourism Bureaus, • Ensuring effective publication and distribution of visitor information through online and offline media • Leading and managing the production and distribution of printed visitor information materials • Developing and implementing the Ethiopia i-Network VIC accreditation system • Monitoring performance and distribution of visitor information	A small ***Visitor Information unit*** will manage visitor information materials, Gateway VICs and accreditation of VICs in collaboration with regions
Route development and attractions packaging and improvement *(In close collaboration with regional Culture and Tourism Bureaus)*	• Identifying, plotting and planning Great Origin Routes • Establishing stakeholder Route Forums • Identifying attractions and sites on routes and establishing an inventory of visitor attractions and experiences per route • Mapping routes and attractions on paper and on the website • Auditing the quality and suitability of key sites and experiences on routes and identify gaps • Launching and managing a route improvement programme for the various routes (sites, experiences, etc.) • Promoting routes in partnership with colleagues in the Promotion Department	An ***Attractions Packaging and Improvement unit*** will develop the Great Origin Routes, work with regional Culture and Tourism Bureaus to audit sites, conduct development feasibility studies and develop visitor
Marketing training and capacity building	• Conducting a training needs analysis among national and regional tourism professionals and identifying suitable training topics and models required • Procuring suitable marketing training, especially practical marketing opportunities where staff work under mentorship of local and foreign experts • Monitoring effectiveness of marketing staff	A ***tourism Human Resources Development unit*** to manage the Tena Yistilign including marketing training, frontline and language training and launching the Ethiopia Tourism Awards
Front-line and guide service training and community awareness	• Developing, launching and managing the Tena Yistilign capacity building programme • Securing opportunities for foreign language training of guides and frontline personnel from foreign embassies and organisations • Developing and managing the Ethiopia Tourism Awards	

- *Improved conditions of employment:* The situation analysis study has proven that the ETO is at a major disadvantage in terms of remuneration levels compared to other similar tourism boards. Urgent improvements in conditions of service are required to attract the best possible expertise and manpower for implementing the strategy, followed by a suitable recruitment drive
- *Outsourcing:* ETO will assess and where necessary outsource certain specialist promotion components such as digital marketing, MICE marketing, route and product development, etc.
- *Market-based representation:* ETO will appoint contracted, specialist market-based representation companies in key markets like the UK, Germany and possibly the USA

- *Engaging foreign embassies and missions:* In markets where ETO does not have representation diplomatic staff based in the particular markets will be trained in tourism promotion and provided with information and marketing materials
- *Training and capacity building:* A concerted ETO capacity building program will be launched to improve knowledge and skills, especially in the areas of execution mentioned above. All training should be focused on specific skills related to the job requirements of participants and while some theoretical exposure will be required training should be conducted mainly through practical implementation and learning by doing. Trainees should be required to complete specific practical tasks as part of training courses
- *Building regional capacity*: Since the Regional Tourism Bureaus are key parties in implementing the strategy they should equally invest in capacity building and strengthening. ETO should provide technical assistance to the regional tourism bureaus and facilitate the exchange of experiences among regions, private operators and tourism authorities of other countries and regions

7.3 Strong and functional partnerships

The strategy will succeed only if it is conducted in close partnership with the private sector and regional Culture and Tourism Bureaus. The following mechanisms will be pursued in the interest of strengthening the partnership between ETO, the private sector and the regional bureaus:

1. Team Ethiopia

'Team Ethiopia' will be a formalised marketing partnership initiative between ETO, private sector organisations, Ethiopian Airlines and the regional Culture and Tourism Bureaus, based on the following agreements:

- Commitment to carrying and promoting the Ethiopia tourism brand wherever possible
- Commitment to actively participate in and support the execution of tourism marketing strategy through financial and/or in-kind support

'Team Ethiopia' will meet on a regular basis (at least twice per annum) to consider and give input to the ETO's marketing plans and activities and endorse ETO's marketing plans through active participation and allocation of human and financial resources.

2. An active Tourism Marketing Committee and workgroups

ETO's marketing plans and activities will be planned and executed in consultation with a marketing committee of knowledgeable tourism industry specialists, recruited from the local tour operator associations, hotel and airline sectors as well as from the main regional Culture and Tourism Bureaus. The Marketing Committee will appoint project-specific workgroups to focus on specific projects and/or campaigns as required. The roles of the committee and project workgroups will be to:

- Participate in the formulation of ETO's marketing plans and advise on the content and execution of the plan
- Assist ETO in making the best possible decisions and choices in applying its limited marketing resources

3. *Clear roles and responsibilities*

ETO and Regional Tourism Bureaus will work together closely in executing the national marketing strategy and in ensuring that the regional marketing strategies are in synergy with the national strategy. The following role definitions will be followed:

Marketing Function	ETO Role	Regional Bureau Role
National brand Management	• Being the brand custodian for the Ethiopia Tourism Brand and laying down and managing the brand architecture and disciplines within which regions will conduct regional activities • Take the lead in executing the brand nationally • Monitor brand application within the framework of brand disciplines	• Appoint a regional brand champion to work with ETO in executing the agreed 'Land of Origins' brand strategy in their respective regions, following the agreed regional brand positioning and disciplines, e.g. in design of printed marketing materials and websites, branding of information centres and any other insignia
International Promotion	• Primary responsibility for devising and executing the international destination marketing plan • Meet with regional bureaus and private sector on a regular basis to consult with them and convey to them the international marketing plan and solicit their participation where feasible • Provide promotional platforms (e.g. national exhibition stands, trade workshops, campaign web-pages, print and digital 'shell' designs, etc.) and a 'menu' of international promotion activities from which regions can select participation on a self-funded basis • Spearhead online marketing and provide guidance and monitoring to ensure that website design, architecture and content reflect Ethiopia as a clearly 'branded house'	• Select from the national 'menu' of international promotion activities those in which the regional bureau want to participate and work with ETO in executing such participation • Where regions attend any international promotion opportunity without the ETO, agreement should be obtained prior to the occasion to ensure that the brand application and scope of regional activities support the national strategy • Develop regional websites in line with national guidelines and support the national online promotion drive through content management of regional websites
Domestic Promotion	• Provide an overarching domestic marketing campaign identity and some 'anchor' promotional activities that form the basis of the campaign, with opportunities for regional participation • Coordinate and communicate with regions to ensure that their promotion activities support the national campaign direction	• Regional Bureaus to lead domestic marketing for their respective areas • Inform and provide input to the content and production of national 'anchor' promotional activities • In addition to national 'anchor' promotional activities, implement any other domestic marketing activities devised at regional level • Apply the brand architecture at regional level

Marketing Function	ETO Role	Regional Bureau Role
Product Development and Packaging	• Lead the packaging of the Great Origin Route network and work with Regional Bureaus in conceptualising the GOR and sub-routes • Audit and identify product improvement needs at sites and attractions of national importance and canvass participation by the regional offices for planning and improving such sites	• Appoint a tourism product champion to work closely with ETO in conceptualising the Great origin Route and sub-routes • Launch a site improvement program in support of and complementary to the ETO product development initiatives
Visitor information services	• Devise the framework, criteria and branding for the Ethiopia i-Network • Provide support to Regional Bureaus for implementing the i-Network concept e.g. branding materials and signage, staff training, etc. • Monitor the implementation of i-Network, produce a portfolio of branded print and digital promotion and information materials as proposed and garner regional input in producing these	• Work with ETO in classifying, refurbishing and affiliating VICs at regional level and training up staff • Produce regional printed and online promotional materials, in support of the Ethiopia marketing strategy and brand and follow Land of Origins brand disciplines and architecture in producing these • Manage online and print content and distribution of digital and print materials and content
Service and awareness training	• Develop the Tena Yistilign tourism program in consultation with the regional bureaus • Train up regional champions for managing the Tena Yistilign program at regional level • Monitor implementation of the program	• Appoint a regional champion and contact point for implementing Tena Yistilign • Work with ETO in implementing Tena Yistilign at regional level

7.4 Adequate funding

Current funding for implementing this strategy is wholly inadequate and the situation analysis study indicates that Ethiopia's tourism marketing budget compares poorly with that of other developing tourism destinations. Implementing this strategy will require a significant increase in marketing funds. The following mechanisms will be pursued in this regard.

1. A tourism departure or bed levy

A departure levy is the simplest and most effective mechanisms for implementing a tourism tax to fund tourism marketing. Such levy can be absorbed as a passenger tax on every air ticket, with airlines in turn paying over the funds to the proposed Tourism Growth Fund (see below). It is estimated that a US$ departure levy on long-haul flights could return US$11 million to US$12 million per annum in 2016. If this mechanism does not prove feasible a bed levy can be considered. It is a prerequisite that levy funds should accrue to a dedicated Tourism Growth Fund and that they should be used only for tourism marketing purposes.

2. Tourism Growth Fund (TGF)

The TGF will be set up with proper financial accounting and governance, under the auspices of the ETO. Tourism levies will accrue to the Tourism Growth Fund and such funds will be used exclusively for destination marketing. The performance of the Growth Fund will depend on the success of destination marketing initiatives.

3. ETO self-generated funds

ETO will set clear goals for supplementing funds generated through Government allocations and levies, with self-generate revenues mainly derived from sponsorships, sale of merchandise and joint public-private tourism promotions. Generating own income should not detract from ETO's main mandate of promoting Ethiopia.

7.5 Monitoring and evaluation

Measuring the growth in tourist arrivals, expenditure per tourist, total tourism revenues and other performance indicators such as tourism job-creation, the revenue multiplier, etc. will require a major improvement in statistical measurement and market research. The following initiatives are proposed in this regard:

1. Valid and reliable tourism arrival statistics

Properly recording tourist arrivals by both nationality and purpose of visit is key to monitoring the strategic objectives as outlined in Section 4. ETO and MoCT will work with the immigration department in improving the validity and reliability of tourism arrival statistics. Measures should be implemented to avoid duplication of figures and wrongly stated purpose of visit.

It should be noted that ESTDP has funded the development of an Information Technology (IT) platform to record and manage tourism statistics in Ethiopia, including information on arrivals, hotel occupancy levels (hotels can enter information online or offline) and data from airport surveys. Regional tourism bureaus will have access to the data pertaining to their respective regions. Templates have been developed for data dissemination. Populating the IT system and templates with valid and reliable data remains a challenge. While a new Directorate of Statistics has been established in MoCT the unit is need of additional human and financial capacity.

In addition partnerships should be established with the private sector, immigration authorities, regional Culture and Tourism Bureaus, the Airports Authority and management bodies of nature and culture attractions to provide regular, valid statistics regarding visitor numbers.

The ETO should collaborate closely with MoCT to avoid any duplication in improving the availability, quality and dissemination of data. ETO should also create awareness among the tourism industry and the public sector regarding the importance of having good and timely data to guide policy, investment and marketing decisions.

2. Regular, high quality visitor departure surveys

Departure surveys targeting a representative sample of tourists and recording origin, purpose of travel, expenditure, length of stay, regions and experiences visited, satisfaction levels, etc. provide the best way of determining growth trends and impacts. The departure surveys conducted in 2013 and 2014 provide some good insights, however the methodology (especially sampling and consistency through the year) should be strengthened and the surveys will be conducted more regularly to allow for reliable trend analysis.

7.6 Tracking progress

The action plan contained in Section 8 below presents the activities and elements that are planned for the next five years and indicates the expected deliverables, responsibilities, costs and success indicators. Importantly, the implementation action plan should serve as a framework for monitoring progress with implementing the strategy and for evaluating the extent of such progress.

Three factors are considered critical for effectively tracking implementation of the plan, i.e.:

i) Mandating a specific individual to take 'ownership' of the implementation monitoring process of the Action Plan
ii) Making urgent improvements to the collection and management of arrival statistics to ensure valid and reliable and well-quantified tourism performance
iii) Ensuring the involvement, support and capacity building of regional Culture and Tourism Bureaus and engaging them in monitoring progress

The following notes pertain to the various columns of the Action Plan:

- *Elements:* These reflect the recommendations contained in Chapters 6 and 7, under the five key priority programmes of a) Encounter the Origin promotion campaign, b) Great Origin Routes, c) Tena Yistilign service and language programme, d) Ethiopia i-Network and e) Meet Ethiopia MICE program.

- *Responsibilities:* The parties responsible for carrying out the recommendations of the project are presented in this column with the lead-implementing agency indicated by the symbol (i), and supporting and collaborating parties by the symbol (ii) onwards

- *Key Actions:* Actions for which evidence of successful implementation should be presented; this also reflects detailed recommendations in Sections 6 and 7 under each action

- *Years:* differentiating between actions to be executed in Years 1 and 2 and those to be executed in Years 3 to 5

- *Two-year cost estimates (US$):* The following guidelines should be noted:

    - The costs pertain only to activities proposed for the first two years of implementing the marketing strategy
    - It is expected that required funding will increase significantly during years three to five, once sound marketing foundations have been laid in years one and two
    - No provision is made for capital expenditures related to site and route improvements as these need to scoped and defined through detailed assessment and capital planning
    - The estimated costs reflected here are broad estimates and have not been subjected to rigorous cost analyses. Costs presented in the action plan are indicative and will need to be verified and finalised when budgets are agreed

- *Success indicators:* Suggested measurements to be agreed in ETO's annual business plan for successfully completing the various actions. The actual targets will be set in annual actions plans.

8 Action plan

The items in this implementation action plan follow the strategic recommendations contained in Chapter 4 and are numbered accordingly.

Elements and responsibility	Actions	Years 1-2	Years 3-5	Estimated Cost Years 1-2 (USD)	Success Indicators
1. Encounter the Origin Destination Marketing Campaign Rolling out 'Land of Origins' brand identity through a multi-year, multi-channel international and domestic promotional campaign called 'Encounter the Origin', to be used as an umbrella call to action and a communication theme for all tourism promotion activities					
1.1 Campaign creative design and production (i) Lead ETO (ii) Regional Culture and Tourism Bureaus	Conceptualise campaign: detailed plan, logo, visual 'look and feel'	X		30,000	Campaign brand applied in all relevant marketing activities Number of suitable electronic applications
	Reflect campaign imagery on national and regional websites	X	X	5,000	
	Branded exhibition stands and materials	X		30,000	
	Electronic and paper-based promotional items (screensavers, displays, folders, etc.)	X		200,000	
	Short promotional videos and photo albums on website and social media	X		Under ESTDP project	
1.2 Online marketing drive (i) Lead ETO (ii) Regional Culture and Tourism Bureaus	Develop appropriate tools for online marketing				Growth in website statistics SEO ranking of official website Social media following Wi-Fi access and speed at key sites
	– Portfolio of high-quality national and regional websites	X		National: Under ESTDP project Regional: 15,000 per region	
	– National and regional social media accounts set up and populated	X		3,000	
	– Digital trade and consumer database established	X	X	10,000	

Elements and responsibility	Actions	Years		Estimated Cost Years 1-2 (USD)	Success Indicators
		1-2	3-5		
	– Content creation and updating	X	X	28,000	
	– Trained up national and regional marketing staff	X		30,000	
	– Free or affordable Wi-Fi access at key tourism points	X	X	Ministry of Communication	
	Online promotion and engagement				Users and hits on campaign pages Number of campaign packages booked Growth in mobile access to campaign offers Social media campaign following
	– Digital marketing campaign 'Encounters' launched and operated	X	X	600,000	
	– Trade 'Encounters' online marketing partnerships set up and leveraged		X		
	– Mobile destination promotion application		X		
	– Ethiopians engaged in promoting 'Encounters' on social media		X		
	Leverage online affiliates		X		Number of campaign partnerships Blogger following Number of bookings on affiliate systems
	– Suitable affiliate marketing partnerships with online distribution channels	X	X	150,000	
	– Bloggers commissioned and results tracked		X		
	– Membership of DMAI		X		
1.3 Travel trade promotion (i) Lead ETO (ii) Private sector (iii) Regional Culture and Tourism Bureaus	Exhibit at the following trade fairs, in partnership with industry and regional partners				Number of new trade contacts on database Number of joint marketing agreements (JMAs) concluded at fairs Number of leads
	– WTM	X		80,000	
	– ITB	X		80,000	
	– Top Resa		X		

Elements and responsibility	Actions	Years 1-2	Years 3-5	Estimated Cost Years 1-2 (USD)	Success Indicators
	– COTTM	X		40,000	forwarded to private sector
	– Special Interest Consumer Fairs e.g. Birdfair UK and a suitable adventure and outdoor show to promote trekking		X		
	Establish and manage excellent travel trade relations	X			
	– Joint Marketing Agreements with selected, valuable outbound operators in core markets		X		Number of JMAs implemented
	– Workshops and educational visits with inbound Ethiopian tour operators	X	X	60,000	Increase in bookings through trade partners
	– Annual series of road shows in two core markets annually, including travel trade workshops	X	X	200,000	Number of new operators reached
	– Suitable tour operators identified and hosted on familiarisation visits in Ethiopia	X	X	100,000	Number of travel trade hosted
	– One mega familiarisation visit arranged hosted per annum, in partnership with the Ethiopian travel trade		X		Number of trade partners affiliated through Lucy's Friend programme
	– 'Lucy's Friend ' online travel trade educational and affiliation program developed and implemented		X		
1.4 Media and public relations drive (i) Lead ETO (ii) Private sector (iii) Regional Culture and Tourism Bureaus	Prepare suitable press kit	X		8,000	Value of media coverage from press releases
	Regularly formulate and publish celebrity stories	X	X	45,000	
	Regular media releases in support of campaign	X	X	50,000	Value of media coverage from press trips
	Identify and host travel press	X	X	140,000	
	Report on achieved media value		X		Number of media hosted
1.5 Domestic promotion drive	Conceptualise and plan domestic campaign		X		Number of bookings

Elements and responsibility	Actions	Years		Estimated Cost Years 1-2 (USD)	Success Indicators
		1-2	3-5		
(i) Lead ETO (ii) Private sector (iii) Regional Culture and Tourism Bureaus	Private operators offer affordable travel packages		X		linked to the campaign Number of operators and packages participating Value of regional participation
	PR, advertising and online drive to promote packages and stimulate domestic travel		X		
	Additional Regional Culture and Tourism Bureau domestic marketing initiatives		X		
	'Take a friend' VFR extension drive		X		
1.6 Tourism events initiative (i) Lead ETO (ii) Private sector (iii) Regional Culture and Tourism Bureaus	Update, maintain and promoted events database and Calendar of Events on website	X		20,000	Number and increase in events on calendar
	Launch events support programme for selective events		X		Growth in tourist numbers attending flagship events
2. Great Origin Routes Development Development and packaging of a core ('spine') touring route based on the main tourist sites of the northern and southern circuits, complemented by a range of themed sub-circuits and routes that branch off the main circuit and that appeal to the various market segments					
2.1 Conceptualising routes (i) Lead ETO (ii) Regional Culture and Tourism Bureaus	Identify and agree core route and regional sub-routes	X		Under ESTDP marketing materials and regional strategies	Number of routes successfully launched
	Consult and agreed route concepts with stakeholders	X	X	5,000	
2.2 Route forums and auditing (i) Lead ETO (i) Regional Culture and Tourism Bureaus (ii) Communities	Visit and audit agree routes regarding opportunities and gaps	X	X	40,000	Number of route forums Individuals participating in route forums
	Hold route workshops to garner stakeholder and community involvement	X	X	20,000	
	Establish route forums of key interested and affected parties and appoint 'champions'	X	X	30,000	

Elements and responsibility	Actions	Years		Estimated Cost Years 1-2 (USD)	Success Indicators
		1-2	3-5		
(iii) Private sector					
2.3 Route mapping and promotion (i) Lead ETO (ii) Regional Culture and Tourism Bureaus (iii) Communities (iv) Private sector	Map routes on website, printed maps, etc.	X	X	Under ESTDP marketing materials	Number of routes on website Growth in website analytics of route maps and pages Growth in visitors numbers at sites on routes
	Promote routes to trade, media and consumers as part of 'Encounter the Origin' campaign elements	X	X	70,000	
2.4 Site and facilities improvement (i) Lead ETO (ii) MoCT (iii) Regional Culture and Tourism Bureaus (iv) Communities (v) Private sector	Scope improvements required on routes prioritised	X	X	To be determined	Number of improvements made Positive change in visitor perceptions
	Improvements planned and cost estimates done	X	X	To be determined	
	'Hardware' and 'Software' improvements conducted		X	To be determined	
3. Tena Yistilign Service Quality Programme An internal tourism awareness drive to raise awareness of the value and importance of good service in the tourism					
3.1 Tena Yistilign service quality training programme (i) Lead ETO (ii) Regional Culture and Tourism Bureaus (iii) Private sector	International tourism frontline service training programmes investigated and best option identified	X		30,000	Number of courses offered Number of frontline staff passed Positive change in visitor perceptions of service quality
	Cooperation established with foreign mission and tourism partners to implement suitable programme	X		-	
	Programme implemented in key tourism areas		X		
	Service quality tracked and monitored		X		

Elements and responsibility	Actions	Years		Estimated Cost Years 1-2 (USD)	Success Indicators
		1-2	3-5		
3.2 Tena Yistilign guide and language training academy (i) Lead ETO (ii) Regional Culture and Tourism Bureaus (iii) Private sector (iv) Community organisations	Guide and language training gaps and needs assessed in association with regional Culture and Tourism Bureaus	X		40,000	Number of guides trained Number of additional language abilities
	Selective foreign missions and cultural organisations approached and language and guide training programmes devised in association with willing partners	X		Foreign donor funding	
	Programmes implemented		X		
3.3 Tena Yistilign Annual Tourism Awards (i) Lead ETO	Awards committee established and patron appointed and awards plan developed with categories and logistics detailed		X		Number of entries for Awards
	Awards launched, entries received and evaluation conducted		X		
	Successful awards ceremony held		X		
4. Ethiopia Tourism i-Network A network and portfolio of tourism information offices and materials that display the brand and operate at a high-quality level					
4.1 Network of branded Visitor Information Centres (VICs) (i) Lead ETO (ii) Regional Culture and Tourism Bureaus	Classification, standards system and branding of VICs for i-Network devised and agreed	X		5,000	Number of VICs assessed, affiliated and branded Number of staff trained Growth in visitor numbers and enquiries
	Audit conducted of staff capacity, technology and facilities of all centres and improvement plan drafted	X		25,000	
	Centres classified and branded	X		150,000	
	Staff capacity building programme launched and executed		X		
	Facilities and technology improved in a phased manner		X		
4.2 Portfolio of high quality marketing and information materials	Detailed scoping of materials described in strategy finalised	X		Under ESTDP marketing materials	Number of brochures distributed

Elements and responsibility	Actions	Years		Estimated Cost Years 1-2 (USD)	Success Indicators
		1-2	3-5		
(i) Lead ETO (ii) Regional Culture and Tourism Bureaus	Suppliers and providers appointed	X		Under ESTDP marketing materials	
	Materials produced and distributed	X		Under ESTDP marketing materials	
5. Meet Ethiopia A national initiative to promote Ethiopia and in particular Addis as destination for Meetings, Incentives, Conventions and Exhibitions (MICE) starting with a Convention desk with the intention of establishing a national Convention Bureau					
5.1 MICE capacity strengthening (i) Lead ETO (ii) Convention centres (iii) Private sector	Establish a Convention unit/desk at ETO	X		Staff cost	Growth in MICE partners and suppliers Growth in suitable MICE capacity
	Feasibility study and destination audit of suitable venues, accommodation and services inventory	X		35,000	
	Identify suitable operators to handle MICE	X		-	
	Support the first MICE East Africa Trade Show	X		20,000	
5.2 MICE marketing (i) Lead ETO (ii) Convention centres (iii) Private sector	MICE brand / logo origination	X		12,000	Growth in MICE delegates to Ethiopia Number of successful conference bids Growth in MICE contacts on database Number of MICE intermediaries hosted
	Communication development (MICE section on website, printed collateral, PR)	X	X	35,000	
	Arrange familiarisation trips to meeting and incentive buyers	X	X	60,000	
	Develop a marketing strategy for packaging of pre/post tour itineraries to take to market	X	X	50,000	
	Initiate MICE market delegate research to better understand the sector		X		
	Attendance at trade shows e.g. Meetings Africa, Johannesburg – annually in February	X	X	65,000	

Elements and responsibility	Actions	Years		Estimated Cost Years 1-2 (USD)	Success Indicators
		1-2	3-5		
	IMEX[18], Frankfurt – annually in May IBTM[19] World, Barcelona – annually in November				
***6.* Implementation capacity** Developing adequate capacity for implementing the strategy					
6.1 Strengthening ETO (i) Lead ETO	Structure ETO appropriately to implement the strategy	X	X	Institutional budget	Level of success in implementation of marketing strategy Improvement of staff skills and capabilities
	Assess and improve employment conditions and recruit high-quality expertise	X		Institutional budget	
	Outsource suitable services as necessary	X		To be determined	
	Appoint market-based representatives in key markets with suitable performance targets	X	X	2,000,000 (Incl. activities)	
	Engage and educate foreign embassy staff in support of ETO's marketing drive	X	X	Foreign Affairs budget	
	Assess training needs in ETO and arrange and conduct suitable staff training	X	X	60,000	
	Provide technical assistance to the regional tourism bureaus and facilitate the exchange of experiences	X	X	40,000	
6.2 Strong and functional partnerships (i) Lead ETO (ii) Regional Culture and Tourism Bureaus	Form ‘TEAM Ethiopia’ through a formalised marketing partnership with Ethiopian Airlines, Regional Culture and Tourism Bureaus and other key parties	X		Team budgets	Number of MoUs concluded Extent of activities undertaken by Marketing
	Establish a representative Marketing Committee and special Product Workgroups	X		10,000	

[18] IMEX – The worldwide exhibition for incentive travel, meetings and events
[19] IBTM World – International business tourism market

<table>
<tr><th rowspan="2">Elements and responsibility</th><th rowspan="2">Actions</th><th colspan="2">Years</th><th rowspan="2">Estimated Cost Years 1-2 (USD)</th><th rowspan="2">Success Indicators</th></tr>
<tr><th>1-2</th><th>3-5</th></tr>
<tr><td>(iii) ET Airlines
(iv) Private sector
(v) Culture and Nature conservation bodies</td><td>Agree and formalise clear tourism marketing roles and responsibilities between ETO and Regional Culture and Tourism Bureaus</td><td>X</td><td></td><td>---</td><td>Committee
Extent of partnerships with regional Culture and Tourism Bureaus</td></tr>
<tr><td rowspan="3">6.3 Adequate funding
(i) Lead ETO
(ii) Ministry of Finance</td><td>Investigate, motivate and implement a suitable tourism departure levy</td><td>X</td><td>X</td><td>To be determined</td><td rowspan="3">Growth in ETO revenues
Growth in ETO self-generated revenues</td></tr>
<tr><td>Establish and manage a Tourism Growth Fund</td><td>X</td><td>X</td><td>To be determined</td></tr>
<tr><td>Generate a suitable proportion of own funds</td><td></td><td>X</td><td></td></tr>
<tr><td rowspan="4">6.4 Monitoring and evaluation of market performance
(i) Lead ETO
(ii) Regional Culture and Tourism Bureaus</td><td>Conclude information partnerships with Immigration, Airport, Airline and other authorities to ensure valid and reliable tourism arrival statistics</td><td>X</td><td></td><td></td><td rowspan="4">Level of completeness of IT platform
Reliability and validity of tourism arrivals statistics
Validity, reliability and frequency of visitor surveys</td></tr>
<tr><td>Populate MoCT IT Statistical Platform with valid and reliable statistics</td><td>X</td><td></td><td>15,000</td></tr>
<tr><td>Improve methodology of exit survey and conduct regularly</td><td>X</td><td></td><td></td></tr>
<tr><td>Publish consistent statistical indicators to monitor market performance</td><td>X</td><td>X</td><td>24,000</td></tr>
<tr><td>TOTAL (2 Years)</td><td></td><td></td><td></td><td>4,750,000</td><td></td></tr>
</table>

Addendum A: Detailed Marketing SWOT Analysis

Strengths	Weaknesses
Positioning	
• *Growing, positive country awareness:* International awareness is growing of Ethiopia as an economic success story • *Excellent growth foundations:* The range of inherent natural, cultural and historic resources coupled with convenient air access and fair value for money provides solid foundation for building a strong competitive positioning • *Strong brand themes:* The unique history, culture and landscape coupled with friendliness and hospitality provide for a good destination brand recipe • *Strong recent tourism growth:* Very good growth has been recorded in tourism arrivals over the past decade, especially from traditional markets in Europe and the USA • *Tourism a Government priority:* The Government places a high priority on tourism as a driver of economic growth and job creation • *Consistent visitor flows through the year:* Seasonal market fluctuations are limited due also to a moderate climate • *Good length of stay:* The majority of visitors stay 14 days or longer providing a good yield per traveller • *Good visitor safety:* The international travel trade rate visitor safety highly and this is an important underlying tourism message and strength	• *Global tourism awareness of Ethiopia remains limited*: International awareness of Ethiopia as a tourism destination is limited and the country has a limited tourism market share • *Market misperceptions:* The majority of international travel trade and consumers do not have clarity regarding the prevailing positive social and economic conditions in the country • *Brand application lacks clarity and discipline:* The tourism brand identity has not been clarified and a fragmented destination image is projected by the national and regional tourism authorities • *Limited leisure tourism share:* Less that a third of arrivals are discretionary travellers (i.e. who do not travel to Ethiopia by default such as holiday, conferencing, etc.) • *Moderate visitor yield:* Receipts per visitor is 'average' compared to other destinations in Africa • *Weaknesses in the tourism value chain:* Tourism facilities, road access and service levels are limited and often of poor quality • *Tourism concentrated in a few areas:* Addis Ababa received the majority of visitors while Amhara, Oromia, SNNP and Tigrai attract significant visitor proportions; tourism arrivals are very limited in other areas • *Visitor health and hygiene factors require improvement:* Aspects such as food and water safety need improvement and visitor communication in this regard is important
Product	
• *Global tourism landmarks:* Ethiopia boasts a large number of globally recognised tourism icons as basis for a strong positioning and attractiveness • *Unique events:* Ethiopia celebrates various colourful traditional events and festivals and some of these could be further developed and promoted for tourism • *Unique special interest products*: The country offers unique experience for Bird watchers,	• *Inadequate tourist facilities:* The variety and quality of tourism facilities e.g. tourist information, accommodation, restaurants, toilets, rest and shade areas, etc. is limited • *Insufficient product interpretation and packaging:* Product interpretation and guiding services require improvement for doing justice to the Ethiopian 'story' • *Gap in visitor infrastructures*: Some key sites require

Strengths	Weaknesses
cultural and archaeological explorers, and outdoor sport enthusiasts, among others • *Good examples of community-based tourism*: Past efforts by the Ethiopia Sustainable Tourism Alliance (ESTA) and others have resulted in some good CBT pilot projects	improvements in feeder access roads, visitor walkways and basic visitor safety measures • *Lack of a tourism events strategy*: While cultural and sport events could be powerful travel motivators, there exists no strategy to maximise their potential • *Community-based tourism projects not sustained:* There are various examples where CBT projects were started with external support but where such support is not sustained
Promotion	
• *Some good printed marketing collateral:* ready for improvement: The national and regional travel guides and brochures are rich in content and provide a good basis for a streamlined portfolio of market collateral	• *Limited destination promotional initiatives and resources*: Promotions are largely limited to trade show presence and a small number of travel media visits • *Marketing operations mostly geared at traditional market segments, methods and channels:* There is limited market diversification towards the more personalised, independent and special interest segments • *Lack of digital promotion*: Poor website presence and inactive social media marketing are considered the most glaring promotional gaps at both national and regional levels • *Promotional materials and initiatives are fragmented:* The national and regional tourism authorities do not follow a cohesive promotional approach and image • *Trade fair attendance lacks a clear strategy*: Performance targets, preparation and engagement at travel fairs
Price point	
• *Moderate value for money some good value aspects:* Some aspects like eating and drinking provide comparatively good value for money	• *Relatively high transport costs:* As a touring destination transport between attractions (ground and air) escalates the cost of visiting • *Some inconsistency and fragmentation in pricing*: Entrance prices to some parks and historical sites have increased substantially. Pricing of some experiences are not streamlined and entails multiple payments (entrance, guide, militia support, etc.
Place/distribution	

Strengths	Weaknesses
• *Good network of tourist information offices:* VICs exist at all main tourism centres • *Excellent air connectivity:* Ethiopian Airlines has good connections and discounts on domestic travel routes (See ***Addendum F***) • *Loyal but limited travel channel following*: Most international tour operators that actively sell Ethiopia are passionate about the country	• *Poor travel trade channel awareness and knowledge:* The majority of foreign, long haul tour operators are not aware of and educated regarding the depth and variety of experiences on offer • *Immature inbound tourism sector:* Although there are more than 300 registered tour operators the majority are ground handlers and transport providers and do not adequately fulfil the role of Destination Management Companies (DMCs) • *Tourist information offices in need of support and refurbishment:* Most VICs do not reflect the Ethiopian brand, staff require training and there is a shortage of information technologies and materials
People	
• *Friendliness and openness of citizens:* The travel trade and consumers interviewed have all highlighted the 'people spirit' as a major tourism asset	• *Local awareness of tourism lacking:* The majority of local communities and citizen are not well informed regarding the requirements and benefits of a growing tourism industry • *Insufficient marketing capacity and skills:* Marketing knowledge and skills (e.g. digital marketing, travel trade relations, brand management etc.) is limited
Processes	
• *Good marketing institutional model*: ETO autonomy and flexibility to respond to market demands secured • *Basis laid for public-private partnership:* The Board of ETO consists of both public and private partners • *Exit surveys are a good start to improved market intelligence:* The 2012 and 2013 exit surveys provide a good basis for expanding market knowledge	• *Weak ETO staff capacity*: Staff numbers and capacity in ETO is inadequate for fulfilling the task at hand • *Inadequate marketing funding:* Funding for tourism marketing is very limited compared to competitors • *Poor foothold in target markets*: ETO has no international representation in key markets • *Limited public-private marketing partnerships:* Although public and private sectors cooperate there are few practical marketing partnerships in operation • *Inadequate market measurement and research for decision making*: The reliability and validity of tourism statistics and research is inconsistent and in need of strengthening

Opportunities	Threats
Positioning	
• *Capitalising on favourable global trends:* The country is well positioned to capitalise on global tourism market preferences for authenticity, growth in both mature and younger 'experience-seeker' travellers • *Developing MICE tourism*: Being the headquarters of the African Union and various other global organisations and having good conference facilities creates a major opportunity for expansion of MICE • *Promoting Ethiopia's 'new beginnings'*: The heritage and messages related to Ethiopia's recent democratic and economic emergence provide for a compelling story and can support the tourism positioning	• *Destruction of fragile resources:* Poorly managed economic development and tourism growth can destroy the very essence of Ethiopia's authenticity and unique historical, natural and cultural tourism resources • *Potential local and regional crises:* global events have shown that tourism destinations should be prepared to deal with and communicate effectively in times of crisis
Product	
• *Packaging largely unexplored but unique experiences:* Experiences like serious trekking, coffee exploration, adventure tourism activities, etc. have been identified by local operators as having potential • *Deepening and intensifying the Ethiopia journey:* Continuously adding value to the Ethiopian experience through local engagement such as visits to communities, using alternative transport methods, participation in local cooking and Amharic writing, etc.	• *Inability to manage visitor pressures*: As tourism pressures mount, greater emphasis will be required to ensure consistent pricing and value for money, ticketing controls to avoid 'lumpy' visitor movements and ensure a quality visitor experience, • *Slow investment take-up in upmarket facilities and products in leisure areas:* For Ethiopia to sustain a high value proposition will require investment in higher quality accommodation and tourist facilities
Promotion	
• *Leveraging latent market segments:* The revenue and word-of-mouth potential of Transit, VFR and Business Tourism visitors could be harnessed, especially through social media and special promotions • *Promoting domestic tourism:* the growing middle class and expatriate market presents a huge opportunity and marketing efforts should capitalise on the potential • *Expanding flexible and independent travel:* Ethiopia relies heavily on packaged leisure travel and has a real opportunity of growing tailor-made and independent market segments • *Capitalising on Ethiopia's popularity with the older*	• *Continued poor internet connectivity:* Exploratory travellers increasingly rely on online sources fro planning their journey on-the-go and for sharing their experiences with friend and family back home, presenting a major promotional opportunity

Opportunities	Threats
visitor: Ethiopia already attracts a substantial proportion of older visitors and ET could capitalise on this by promoting country as a destination for the 'mature explorer', a growing market segment as more travellers are mobile as they grow older • *Partnering commercial travel guides:* Guidebooks like the Bradt and Lonely Planet provide excellent visitor references and could possibly be partnered • *Producing high quality promotional tools under ESTDP marketing materials project:* The ESTDP project is funding various productions and if done correctly this could substantially elevate the brand image and promotional impact	
Price point	
• *Continuously improving value for money*: Product and service quality should be continuously improved through training and information distribution	• *Danger of expensive and poor value-for-money perceptions:* As tourism grows and demand outstrips supply, there is a possibility of inflationary pricing, which could quickly lead to negative perceptions and social media exchanges
Place/distribution	
• *Marketing collaboration with Ethiopian Airlines:* The airline has marketing and sales offices throughout the world and its route network is well established in Ethiopia's key markets. This presents excellent joint marketing opportunities	• *Inadequate adaptation to online marketing dynamics and channels:* Ethiopia is behind when it comes to digital marketing and online, especially mobile distribution channels, which are expected to progress rapidly in the next few years
People	
• *Retaining and building on the authentic hospitality of the Ethiopian people:* Local hospitality and the spirit of the people is a major tourism asset and resource that should protected and enhanced as a cornerstone of the tourism experience	• *Negative social and cultural impacts of unmanaged tourism and other commercial developments:* Displacement of cultural lifestyles through poorly managed agricultural expansion and insensitive tourism is already having negative effects on some communities and should be addressed urgently
Processes/partnerships	
• *Building a strong Team Ethiopia partnership:* Current initiatives to strengthen tourism relations among public sector authorities and between public *and private sectors is commendable and should be supported*	• *Continued underfunding and under-capacity of ETO*: ETO requires specialist marketing skills and adequate financing to do justice to the brand and promotional mandate

Addendum B: Market Analysis

Introduction

The following section provides an overview of the key potential sources of leisure visits for Ethiopia.
It is divided into three main sections.
The first section provides an overview analysis of the key potential source markets, by country, for leisure visitors to Ethiopia. Markets are categorised into four broad groups. The second section provides portraits of the characteristics of the main source markets, by for example, demographics, outbound market size, trips to Ethiopia and visits to comparator destinations.
The third and final section outlines the key markets segments for Ethiopia – their activities, interests demographics, etc.

Overall market composition

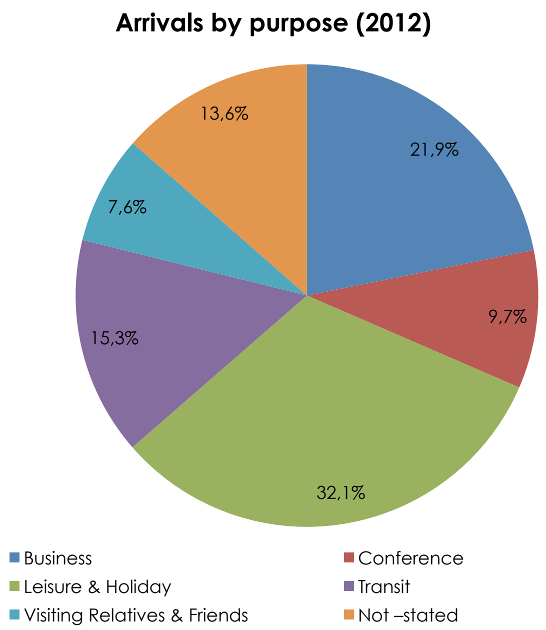
The chart (right) summarizes the breakdown of arrivals to Ethiopia by purpose (based on 2012 data).

- The leisure and holiday market is the largest single market accounting for about a third of arrivals (32%).

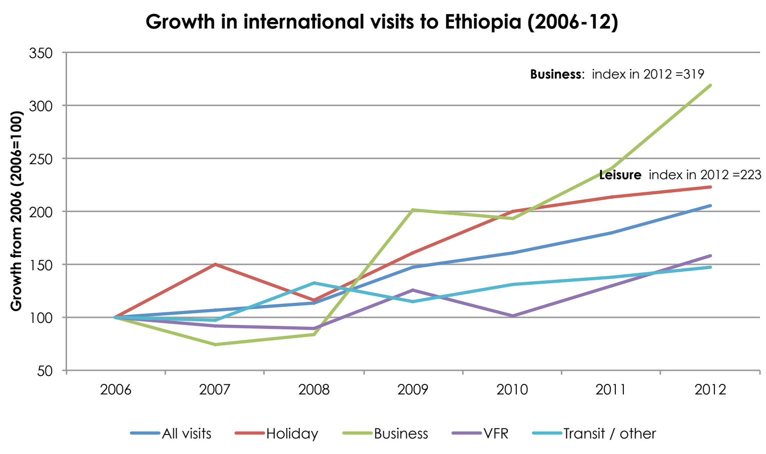
- General business visitors accounted for 22% of arrivals with conference visitors accounting for a further 10%[20]. Together this market was about the same size as the leisure market (i.e. nearly 32%). The ratio of leisure tourism is low compared to more established tourism destinations

- Transit visits are the next largest market (at least in volume terms – 15%).

There are however some grey areas in this analysis. For example nearly 14% of visits are 'not stated' – i.e. purpose of visit was not recorded. In addition, the World Bank[21] estimate business visits may be more significant due to many business travellers entering on a tourist visa while their main purpose is business. VFR and diaspora may also be understated.



Source: MoCT.



Source: MoCT (2013)

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[20] Trends in purpose of visitation unavailable

[21] Ethiopia's tourism sector: Strategic paths to competitiveness and Job creation – World Bank Group / MoCT (2012)

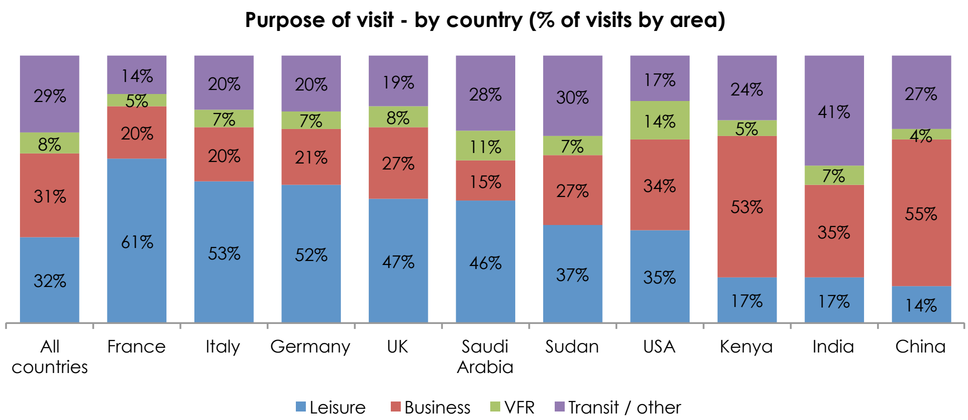
- Growth in arrivals over the last few years has varied by purpose of trip. Business (including conference) visits have grown the most significantly albeit this has been slightly erratic (with a dip in 2007 / 2008 – the start of global recession). Leisure visits have also experienced relatively robust growth from 2006, although not as buoyant as business during the period 2010-2012. NOTE: this trend may be influenced by changes in requirements for business visas.

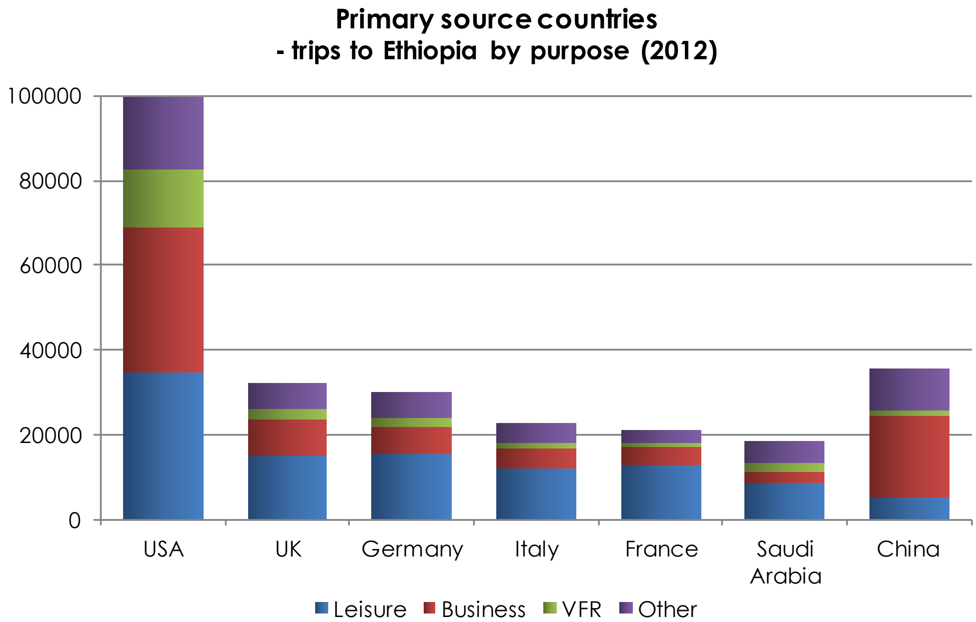
The following charts show the breakdown of visits by purpose from different world regions.

- Europe (particularly France, Italy, German and UK) and, to a lesser extent, the Middle East (in particular Saudi Arabia) were more likely to be holiday visitors. Visitors from the Americas (mainly the USA and Canada) were more likely than other visitors to be visiting friends and relatives (most probably due to the large diaspora in the USA) and were equally inclined to be on holiday or business, although the leisure inclination of USA visitors is significantly lower that that of visitors from Europe.

- The figures below indicate that Asian visitors (mainly from India and China) and visitors from Africa (e.g. Kenya) were significantly less likely to be on holiday or Visiting Friends and Relatives (VFR) – they were more likely in transit or on business. Sudan was an exception to this pattern – mainly leisure visits.

Of the core source countries, the USA generates the most trips to Ethiopia. Combined, the four European countries generate more trips.

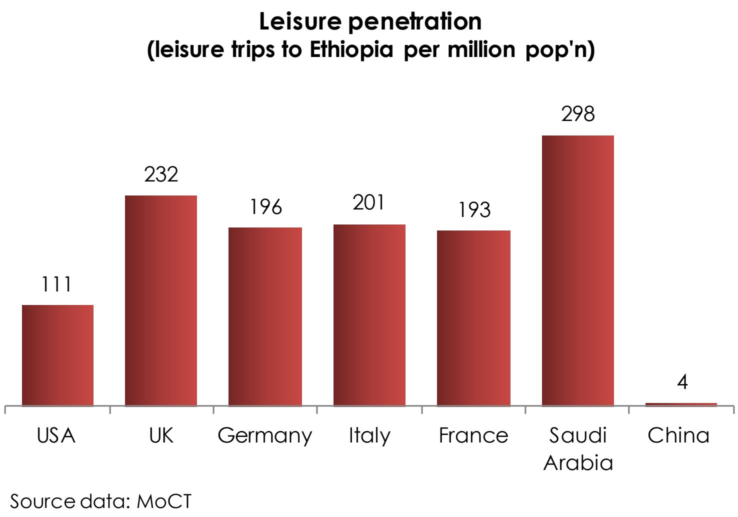




Source: MoCT

The USA is particularly significant for business and VFR (visiting friends and relatives) trips generating more trips than the European countries combined. It is less significant as a generator of leisure visits – the European countries generate nearly 60% more leisure visits than the USA, and more leisure trips per capita.

Saudi Arabia is the smallest market of the core source countries but most visits are for leisure. Its leisure penetration factor (leisure trips per head of population) is the highest among the core countries.



China, while a relatively large market, is generating less leisure trips than the core source markets. It has a very low leisure penetration factor.

Evaluation of source markets

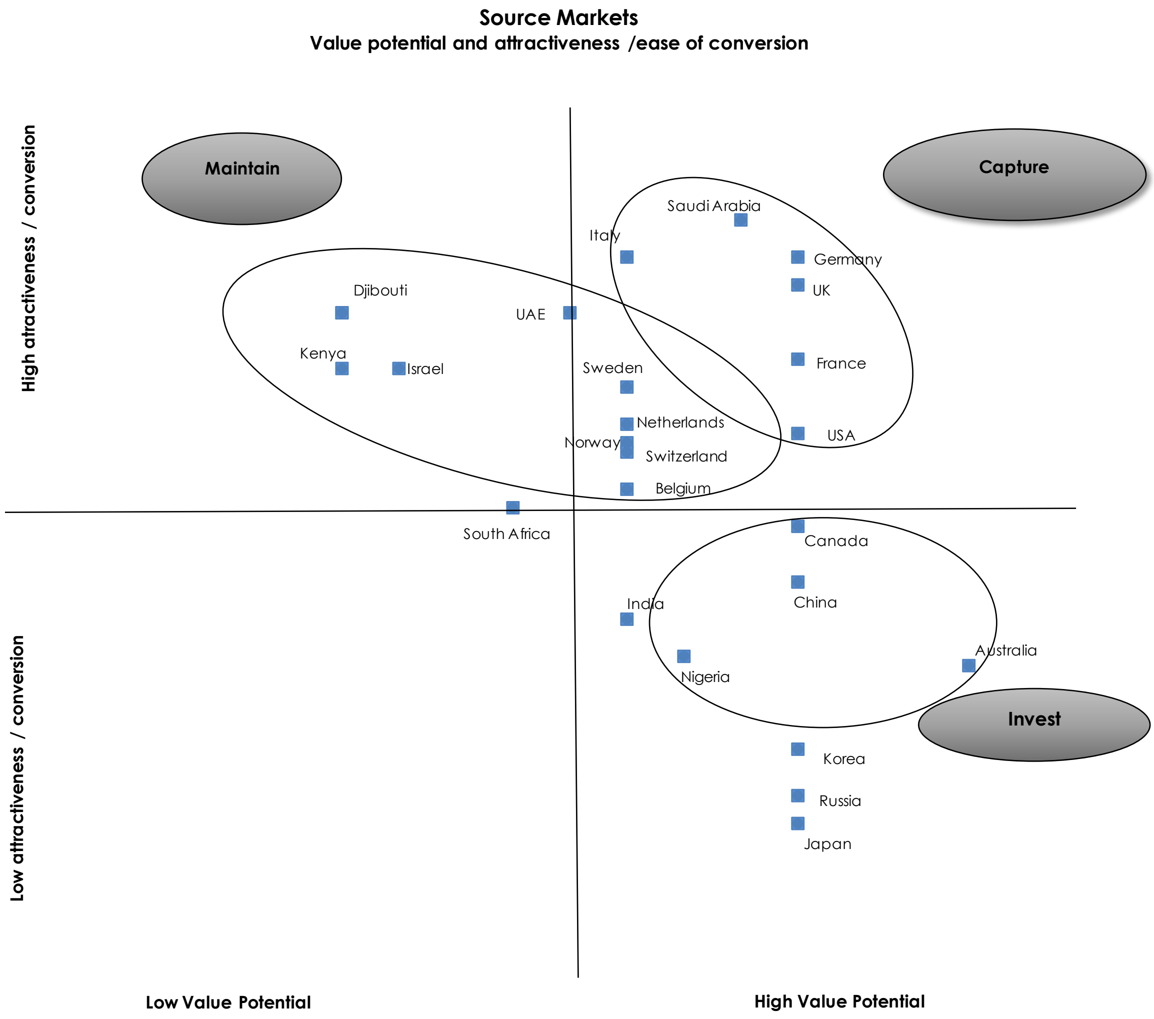
The relative attractiveness of different markets, by country, for Ethiopia have been and analysed and categorised, using available date, against two indices – these are:

- Value potential of the market – its current global importance and its future growth potential
- Ease of attracting them and converting them to Ethiopia based on, for example, transport links, current visits to Ethiopia, current penetration of Ethiopia within overall markets.

Each country was rated on a score of 1-5 against a variety of factors. Each factor was then weighted. The following table summarises the factors and weighting used to calculate the indices.

Index	Factor	Weighting
Value potential of the market	Size of outbound market - based on personal spend – (Source: UNWTO)	3
	Forecast growth in outbound tourism to 2030 (Source: based on UNWTO 2030 forecast of growth to 'emerging' countries)	1
Attractiveness and ease of conversion	Current leisure arrivals to Ethiopia (Source: MoCT)	2
	Growth (absolute) in leisure visits to the Ethiopia (2013/09) (Source: MoCT)	1
	Connectivity – based on travel times, costs and direct flight connections (Source: Expedia)	3
	Relative penetration of Ethiopia trip taking in the population	3
	Broader fit and links based on the size of other markets (business/VFR) to Ethiopia (Source MoCT.	1

The value of markets to Ethiopia and attractiveness of Ethiopia to markets is summarised in the following chart.



From the chart four potential target market groups can be identified:

- Core ('Capture') markets – high value potential, and attractiveness/ease of conversion
- High potential ('Invest') markets - high value potential but more difficult to attract convert.
- Steady ('Maintenance') markets – lower value potential but high attractiveness / ease of conversion.
- Opportunity ('Tactical') markets - lower potential value and/or more difficult to attract/convert.

These markets will have different priorities and development timescales
Core markets represent immediate target audiences for Ethiopia. These are high value markets that are already visiting Ethiopia in significant volumes. Key markets in this group are:

- North America – the USA
- Europe – UK, Germany, France and Italy
- Saudi Arabia.

The priority for this group is to increase market penetration in the short and medium term.
High potential markets – these are potentially high value markets but are currently less attractive to Ethiopia because conditions are not quite right to penetrate them fully. Issues will be around

awareness and the difficulty/cost of penetrating the market, product / market fit, ease of travel, and strong competition from destinations with similar product that are closer.
These countries include Canada, China, Nigeria, and Australia.

In marketing terms these will be a slightly lower priority. The priority will be on medium term promotion with a view to growing these into the core market portfolio in the longer term

Steady markets – these are currently relatively important markets for Ethiopia but are less attractive in terms of investment in marketing activity since they are lower value markets, or have more limited growth potential. There are mainly neighbouring Middle Eastern and African markets (such as Sudan, Kenya, Dijbouti and Israel) and smaller European markets like (The Benelux and Scandinavian countries, and Switzerland).

Marketing activity should be focused on limited promotional activities with the aim at increased penetration by strengthening existing travel trade relations to ensure packages expand and deepen.

Opportunity markets – these are either lower potential value and /or more difficult to attract / convert. They include countries like South Africa, Korea, Russia, India, UAE, and Japan.

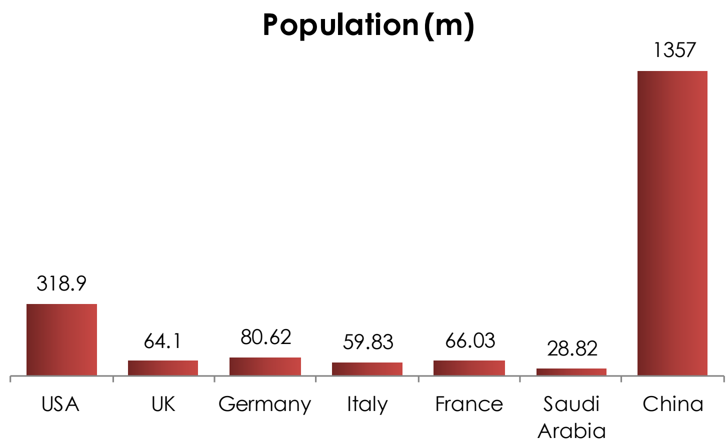
Inventions in these markets will be more tactical and opportunistic, and based on supporting relevant partners.

Key source market profiles

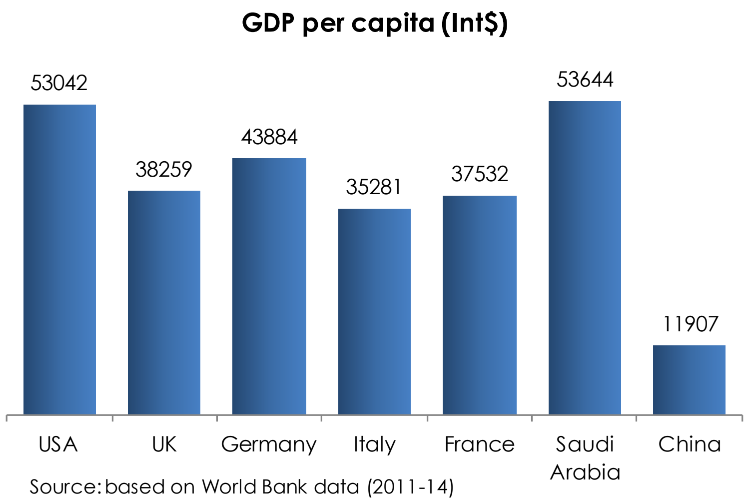
The following section provides an overview of Ethiopia's potential core markets (USA, UK, France, Italy, Germany and Saudi Arabia), and a high potential market (China).

General Statistics

- China has the largest population
- Of the core source countries, the USA has the largest population – greater than the population of the other (UK, Germany, Italy, France) combined.
- The other countries all have substantial populations – typically 60m +. Saudi Arabia is the exception (nearly 29m).
- Saudi Arabia and the USA have the highest GDP per capita at Int$53k- over 20% more than Germany.
- GDPs per capita in the other core countries are all high. All these countries are in the top 10 richest countries in the world – in absolute terms and per capita.
- China's GDP per capita is much lower.



Sources: include World Bank

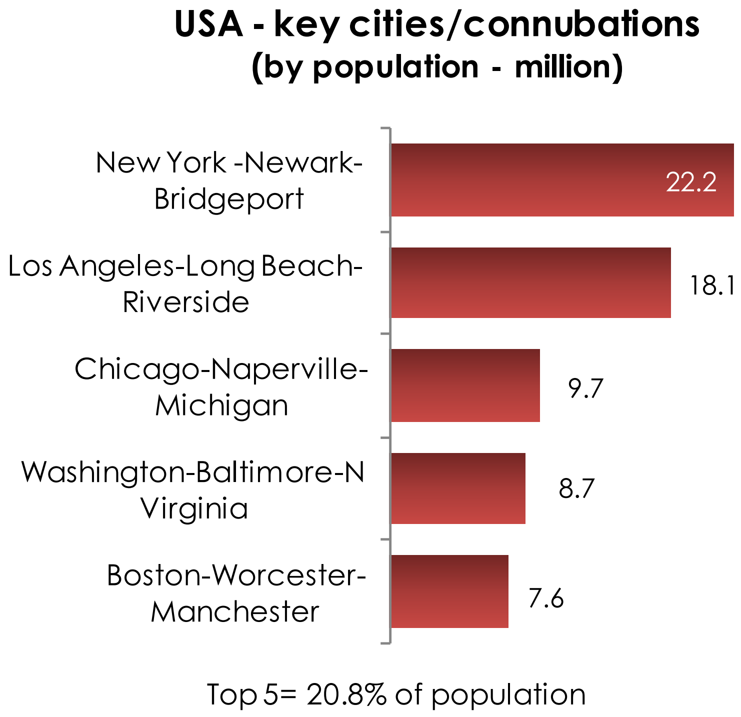


Source: based on World Bank data (2011-14)

The primary source countries are all highly urbanised with substantial populations concentrated in a number of primary cities and wider conurbations[22].

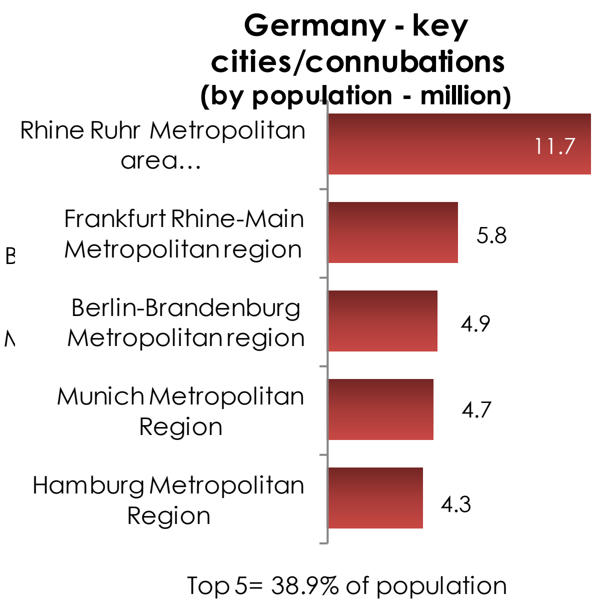
In the USA about 20% of the population are concentrated in five conurbations – with over 40million people in two conurbations (New York and Los Angles).

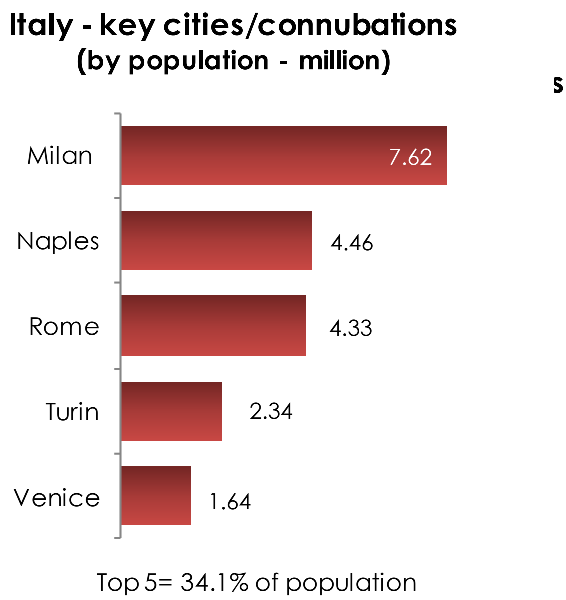
Other significant areas (with over 6 million people) include San Jose-San Francisco, Philadelphia, Dallas, Miami, Houston, and Atlanta.



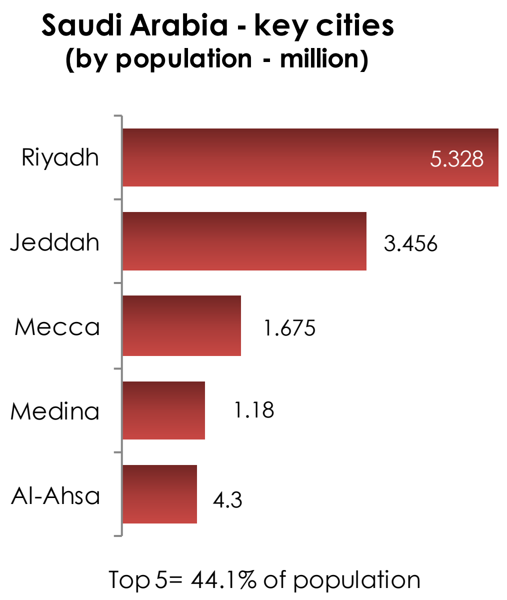
Among the European countries, the population is even more concentrated in the largest conurbations – typically over a third of the country's population (France is the exception at approximately 28%). In the UK and France the capital cities (London and Paris) contain the primary concentrations of population (and wealth).

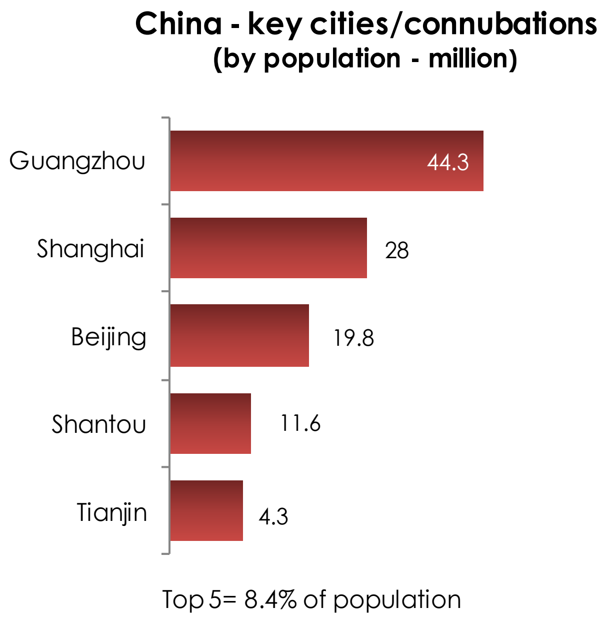
Germany and Italy's urban population are spread across a number of conurbations. The key ones are the Rhine-Ruhr area (which includes Dusseldorf and Cologne) and the Frankfurt area in Germany, and Milan in Italy.





[22] Data on major conurbations is drawn from Wikipedia and based on different sources depending on countries.



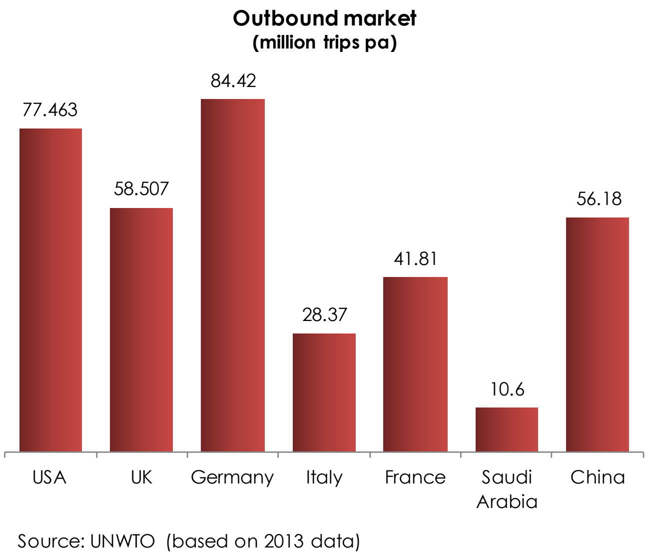


While Saudi cities are slightly smaller than other countries, the population is more heavily concentrated in key conurbations (44% of the population). China is the opposite with huge conurbations (in absolute terms) but these are less significant as a proportion of the overall population (8% - a reflection of the overall population).
Of these primary conurbations Ethiopian Airlines currently flies to the following:

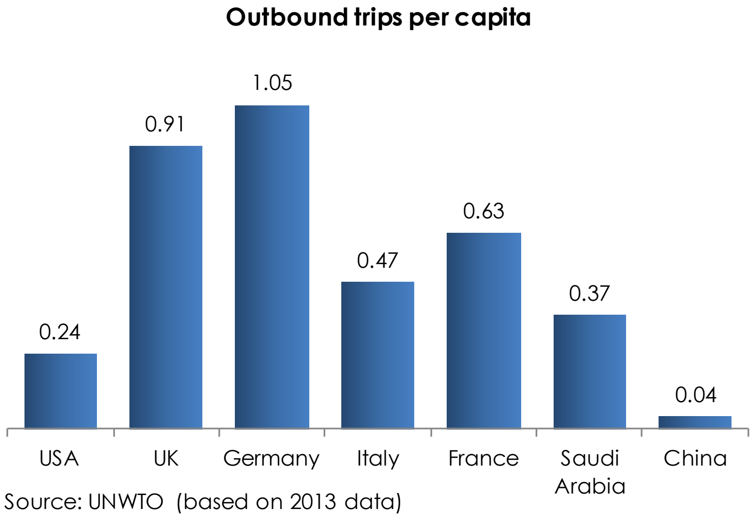
- USA – Washington and Los Angeles (plus Toronto in Canada).
- UK – London
- Germany – Frankfurt
- Italy – Milan and Rome
- France – Paris
- Saudi Arabia – Riyadh and Jeddah
- China – Beijing and Shanghai

Outbound Markets

Among core markets, the USA, Germany and UK are the three biggest outbound travel markets in the world and key long haul markets. France and Italy are also significant markets. The Saudi outbound is smaller in absolute terms.
China is a large outbound market – larger than France and Italy.

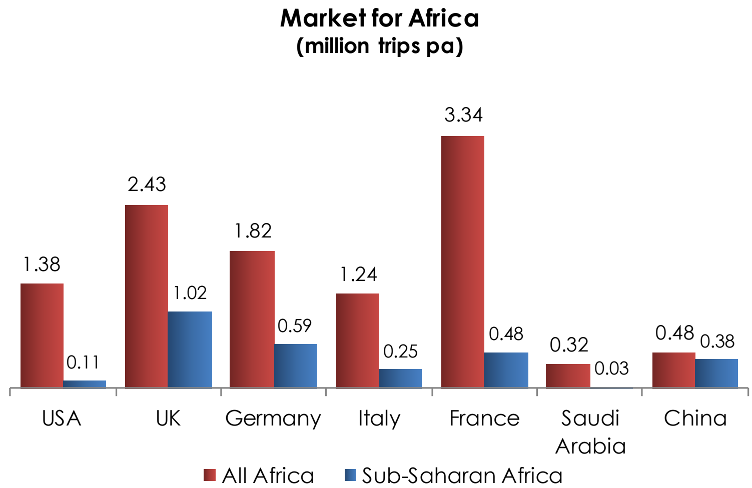


Per capita, Germany and the UK have the most active outbound population generating on average about one trip per head of population per year - approximately four times as many as the USA market and 25 times the Chinese market.



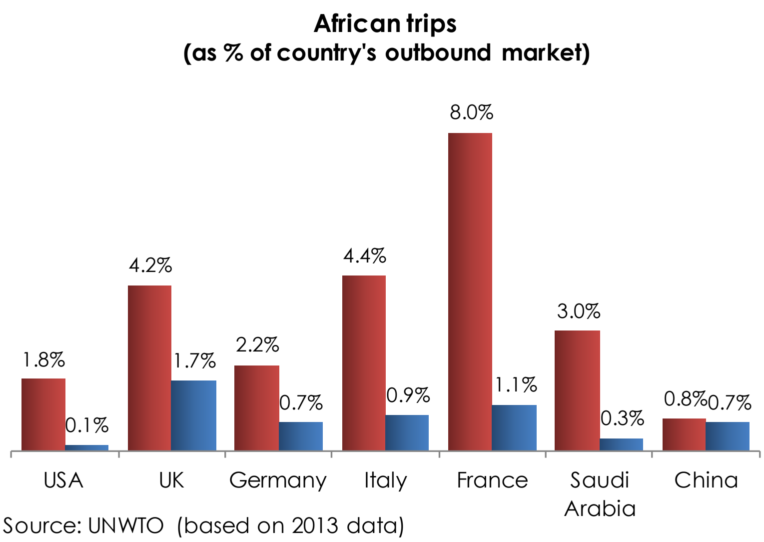
Source: UNWTO (based on 2013 data)

Of these markets, the French are the most likely to visit Africa (over 3.3m trips per annum) although most of this is to North Africa.



Source: UNWTO (based on 2013 data)

The UK market is most likely to visit Sub-Saharan Africa, followed by the Germans.



Source: UNWTO (based on 2013 data)

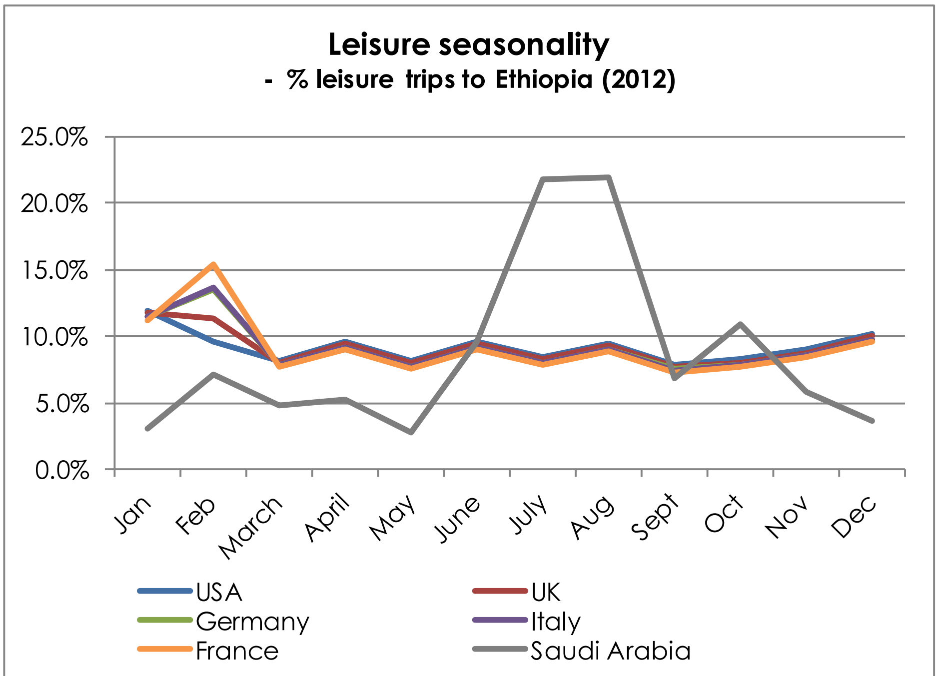
For most of the core source countries, five destinations account for the majority of outbound trips. Typically these will be neighbouring (or near neighbouring) countries.
This is particularly the case for Saudi Arabia, where nearly 84% of trips are to five neighbouring countries.

Source Countries – main outbound destinations							
USA		**UK**		**Germany**		**Italy**	
Mexico	24.5%	Spain	19.7%	France	15.4%	France	27.6%
Canada	15.5%	France	15.5%	Austria	13.9%	Spain	11.5%
France	4.0%	USA	5.3%	Spain	11.7%	UK	5.9%
Italy	3.7%	Ireland	5.0%	Italy	11.3%	Germany	5.6%
UK	3.6%	Italy	4.7%	Turkey	5.7%	San Marino	4.3%
% trips to top 5 destinations							
51.3%		50.1%		58.1%		54.7%	
France		**Saudi Arabia**		**China**			
Spain	22.8%	Bahrain	47.7%	Hong Kong	30.4%		
Italy	12.6%	Kuwait	22.3%	Macao	11.2%		
UK	9.4%	Qatar	6.3%	Thailand	8.2%		
Morocco	4.3%	Jordan	5.2%	S. Korea	7.7%		
Germany	3.8%	Yemen	2.2%	Taiwan	4.9%		
% trips to top 5 destinations							
52.8%		83.7%		62.4%			

Source: UNWTO (based on 2013 data)

While January, February and, to a lesser extent, December are peak months for leisure visits the overall pattern of leisure visits does not demonstrate particular seasonal peaks and troughs (unlike many other destinations).

Seasonal patterns of leisure visiting among the core source countries are generally similar with typically a peak in January and February.
The Saudi market is completely different with a noticeable peak in July and August – reflecting the summer exodus in the Saudi Arabia.



Source data: MoCT

The Competition

Global tourism is a competitive market place. The following table highlights the level to which primary source markets visit comparable / competitor destinations – the figures are presented as a percentage relative to trips to Ethiopia.

Visits to comparator destinations (relative to visits to Ethiopia)							
	USA	**UK**	**Germany**	**Italy**	**France**	**Saudi Arabia**	**China**
Egypt	36	2617	2100	1878	820	965	75
Morocco	50	1050	833	822	8420	286	-75
Nepal	-57	0	0	-56	0	-	257
Peru	350	67	133	89	300	-	-59
Tanzania	-36	100	100	122	60	-96	-45
Vietnam	300	433	300	22	900	-96	5921
NB figures are presented as a percentage relative to trips to Ethiopia. Source: UNWTO (based on 2013 data)							

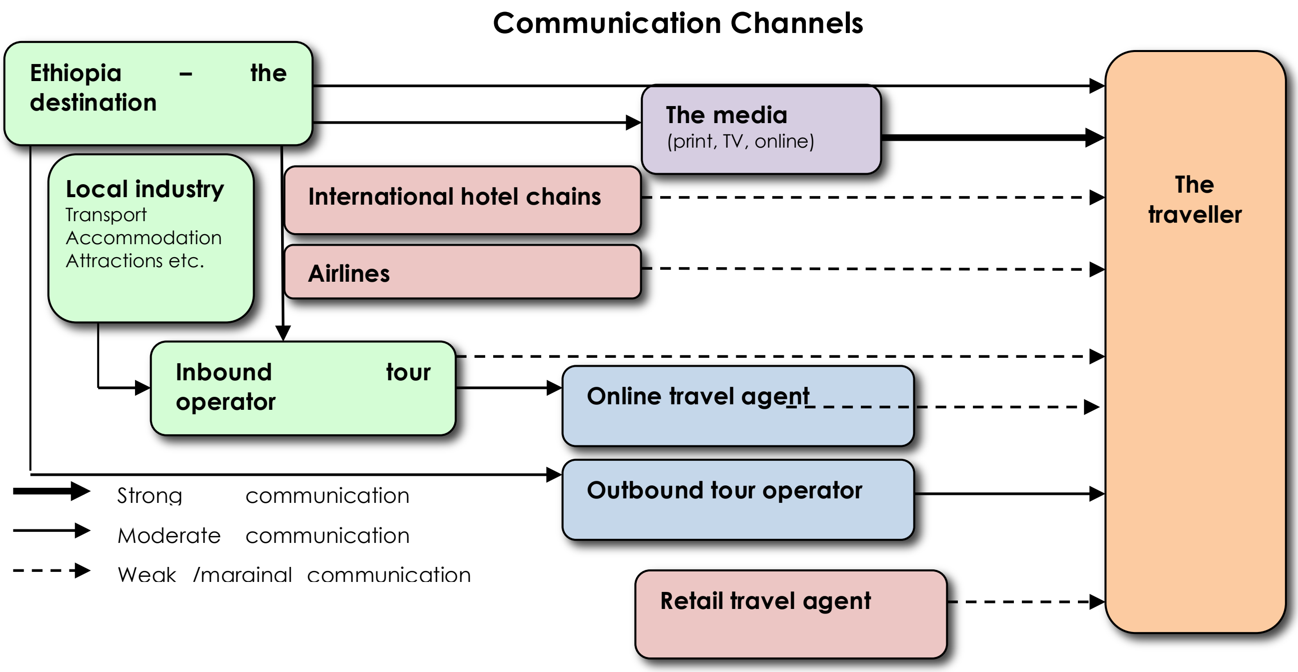
It highlights that European and Saudi Arabian markets are much more likely to visit Morocco and Egypt (even after its substantial downturn in visits) – albeit these are now established mass-market short haul destinations.

Vietnam also features strongly particularly for the Chinese and French (a product of its colonial legacy) but also for the UK. USA markets are more likely to visit Peru (relative proximity).
Saudi markets are tending to visit neighbouring and other primarily Muslim countries.

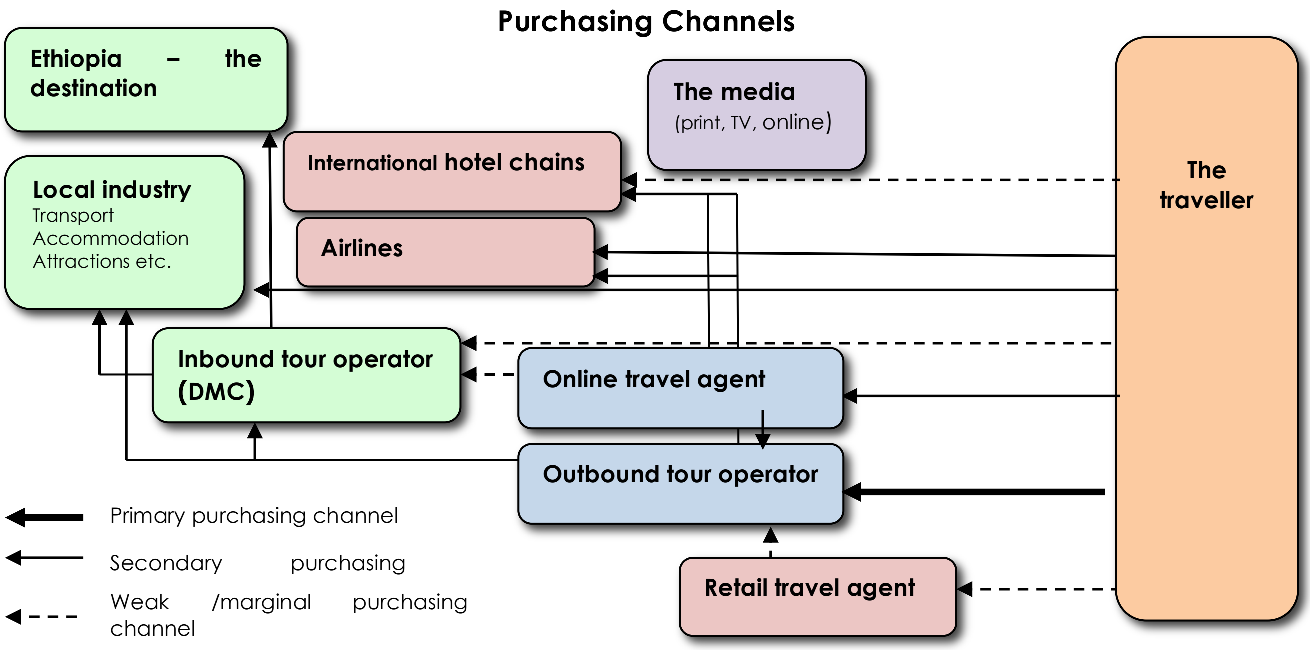
Communication and Sales Channels

The travel communication and sales chain is extremely complex with multiple players. There is a range of relationships between destinations and businesses, businesses and businesses, destinations / businesses and end consumers. The following diagrams[23] provide a simple summary of this. The first shows the communication channels – essentially the route of marketing messages and information to reach and influence the potential visitor (NB: it excludes channels in the control of the destination – print, advertising, web etc.).

[23] Adapted from CBI Market Channels and Market Segments (CBI)



The second shows the purchasing relationship from the potential visitor – back to the end product.



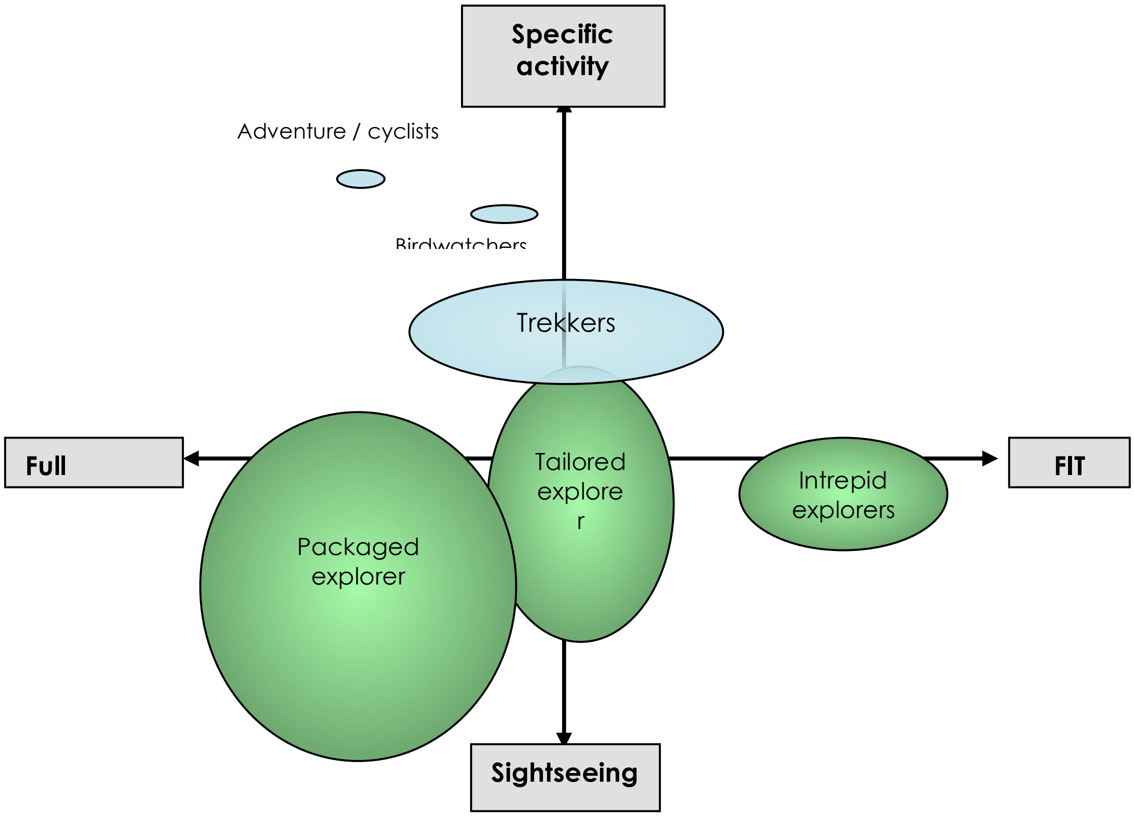
The following table discusses key channels in the context of Ethiopia. There are variations depending on the source market and some of the key ones are also outlined in the following table. It should be noted this is a brief overview – it is an area that would benefit from further research.

Key Channels	Role in communication/awareness	Role in purchasing
Media / press	Coverage through newspapers, general and specialist magazines and TV. This is a key potential source (aside from word of mouth and social media and paid for activity) for generating consumer awareness of Ethiopia. It can be partially influenced by activity from a tourism organization.	Extremely limited. Some papers may feature 'reader's offer'.
Airlines	Airlines will promote destinations where they have routes. They are however more likely to promote their overall brand, but the flag-carrier status of Ethiopian Airlines is a major brand awareness benefit. All in all is not a channel that will create significant tourism destination awareness, though.	Quite important as a sales and booking channels, especially considering the existence of Ethiopian Holidays and flight booking integration with other travel elements through GDSs and OTAs like Expedia and others MICE, independent and tailor made travellers will book direct with airlines
International hotels	Like airlines, hotel chains will promote destinations where they have a presence but this will be limited with the emphasis on the brand. Leisure-focused hotels and resorts will promote their offers against the backdrop of destination attractions and are therefore important destination promoters. Hotel brands are also important destination brand endorsers; the fact that major hotel chains invest in a destination makes it easy to arrange a trip and increases the credibility of developing tourism destinations.	Through the emergence of Online Travel Agencies like Expedia, Booking.com, Hotels.com and others, online accommodation In Ethiopia international hotels are currently largely restricted to Addis Ababa so direct bookings through OTAs are expected to be largely restricted to Addis Ababa.
Local accommodation operators	At present the role of local operators will be fairly limited. Only a few local operators will have direct reach into source markets – typically where there is a specific connection (e.g. Bale Mountain Lodges; Simien Mountain Lodge, etc.).	As indicated above, at present direct consumer to local operator purchasing pre-visit will be limited, but will grow in the future. Some fully independent travellers (FITs) may book direct. In country purchasing of such locally owned accommodation will be more common but still limited. The route to purchasing will typically be indirect through DMCs, and foreign tour operators.
Inbound tour operators DMCs	Like local accommodation operators, inbound tour operators will have a limited role in	Direct consuming will be limited to some semi-independent travellers,

	communication about the destination direct with the consumer. However, their contact and communication with foreign outbound tour operator partners and media is important for raising awareness of the destination, and especially new and lesser-known attractions.	those making tailor made packages and FITs. As independent travel increases so will direct bookings increase, especially for repeat visitors Most purchasing will be through outbound tour operators.
Online travel agents	Online travel agents / portals include companies like Expedia; TripAdvisor will normally feature content on destinations but not actively promote them. The OTAs are increasingly engaging in Joint Marketing Agreements with DMOs for promoting destination brands and promotional calls to action on their pages.	Among certain markets for Ethiopia (semi-independent travellers, those making tailor made packages and FITs), these will be an important purchasing channel – especially for airlines and accommodation.
Outbound tour operators	Tour operators will package and organize itineraries – they will typically specialize in either a geographic area or a particular product theme (or both). They have a strong role in communicating about and selling a destination through showcasing what's on offer in some depth. However, they are unlikely to be necessarily creating significant first-line awareness of the destination among consumers.	For Ethiopia, consumers are likely to purchase through outbound tour operators. These will offer both full and tailor made packages. Typically, for Ethiopia, they will be specialist operators (as opposed to mass/major operators)
Travel agents	Travel agents sell tour operator products and other individual components. In some cases they are integrated with tour operations. They may have a role in promoting the destination but, in general, for Ethiopia this is likely to be limited, unless ETO strikes up Joint Marketing Agreements with outbound tour operators who sell their packages through retail travel agent shops where they are able to promote destination images, prices packages, etc.	Ethiopia will not typically feature strongly within their offer and will mostly be sold by specialised tour operators. While most sales will be direct from consumers to specialised tour operators in some markets tour operators may conduct their sales through their own or related retail travel agent channels

Market segments

The following section provides a conceptual analysis of the potential characteristics of Ethiopia's market research. This based on a range of sources – available market research of visitors to Ethiopia (like The First International Visitors Exit Survey and the Ethiopia Tourism Statistical Management System (ETSMS) Annual report – 2015)[24], discussions with tour operators and stakeholders, other systems of market segmentation (particularly that used by South African Tourism), and our own knowledge and experience. It is a conceptual framework and should, over time, be market tested through primary research.



The diagram above conceptualises Ethiopia's potential markets. Market segments are defined by two key parameters, which are represented against the two axes in the diagram. . The first axis is about what people are **doing** in Ethiopia. It is about the relative balance between **sightseeing** (i.e. visiting key historic and natural sites, seeing the tribes, going to events and festivals, and undertaking Ethiopian experiences like markets and coffee) and undertaking a more **specific activity** (such as bird or wildlife watching, trekking, cycling or other adventure sport activities).
The second axis is about how they are **organising their trip** – from fully packaged (where a complete package is bought 'off the shelf') to fully independent where they are self-organising all elements of their trip. The size of a market is relative to the size of its 'bubble'.

A number of broad points emerge from this:

- The market tends to some form of packaging
- The bulk of the market will be motivated by sightseeing and discovery type activity. Special interest markets will be smaller although the trekking market is a potentially significant market.

[24] Both produced by MoCT

Market segment	Travel desires	Demographics and profile	Main interests and locations	Awareness and booking channels
'Embrace' segments Segments with high growth scope and which Ethiopia is ready to receive. Apply the full promotional mix and at least 60% of promotion resources to target and attract these segments over the next five years				
Packaged explorer Currently the largest leisure touring market segment but expected to decline in market share as the destination matures All Core and Invest markets Europe, USA, Asia	Cautious 'soft' exploration - looking for somewhere different – it's partly about sharing the story Need pre-arranged assurances and support and find security and confidence in numbers	Ethiopia likely second or third visit to developing countries Aged 50+ working or in early/active retirement Medium-affluence and price conscious 10-21 days Medium-small groups (6-20) booking either alone, with partner or possibly small groups of friends Fairly well read and educated	Primary: Unique historical sites and Festivals. Secondary: landscapes and nature, walking Value for money experiences at hotels, catering, guiding, etc. is important Locations: Main northern and southern circuits Could combine Ethiopia with other East African destinations	Influenced by word of mouth, press coverage, and TV programmes. Pre-visit knowledge of Ethiopia will be basic to moderate – some associations and heard of some of the key. Likely to do pre-visit planning via the internet and guidebooks. Booking and arrangement through a smaller independent tour operator; limited involvement of local inbound operator
Tailored explorer Currently not as large as the packaged leisure touring segment but expected to grow fast as destination awareness grows and services	Confident 'soft' exploration - looking for somewhere different but more experienced and want to delve deeper and veer off the traditional circuit	Likely to have travelled to Sub Saharan Africa and other exotic destinations before Aged 45+, working or in early / active retirement. Affluent and less price-	Unique historical, cultural, environmental, scenic experiences, both key sites but also lesser-known experiences Good to high quality and special experiences at hotels, catering, guiding, etc. is important	Influenced by word of mouth, press coverage, and TV programmes. Substantially pre-visit planning via the internet and guidebooks. Significant knowledge of

improve USA, Europe	Need advice, pre-arrangement and ground services especially in reaching lesser known areas	conscious 10-14 days Typically as a couple or with a small group of friends Well educated, well read and curious	Locations: Main circuits and other key sites Bale Mountains, Harar, Awash, Gerhalta, Afar, etc. Getting somewhat involved in the culture of Ethiopia – visiting markets, coffee houses etc. The trip may combine with more active walking / trekking although this would be a secondary activity to sightseeing.	the key sites and attractions and some understanding of culture and traditions Booking a tailored package through a smaller independent tour operator Major involvement and advice of local inbound operators
Trekkers (See *Addendum E* for a detailed profile) Currently limited but probably largest potential of 'special interest' groups, and can expand fast More likely to be European	As with Intrepid Explorers they are confident travellers having hiked in their own countries and beyond, always in search of new mountainous and other topographical trekking areas It's about a different, off the beaten track destination	A broad group in terms of their demographics and attitudes – the key common area is the trekking. Likely to trekked in other relatively exotic locations previously but not necessarily in sub-Saharan African. Aged 35-60. Group composition could be quite mixed and include individuals, groups of friends / clubs and couples. Generally well educated, well read and active	Experiencing exceptional landscapes and culture first hand. It's about discovery and relaxation. Trekking is the primary interest but not the only one. History, culture and wildlife will also be important components for this group, a 'living landscape'. The level (and distance) of the trekking will vary within this segment. Exercise and physical achievement are secondary components. Like other groups the 'story' is important. Locations: Prioritise and look for special topographies – Simien Mountains, Bale Mountains, Tigrai Gerhalta, Possibly charity and	Influenced by word of mouth, social media, wider reading (books, newspapers, walking books) and documentaries. Substantial pre-visit planning via the internet, travel guides and specialist walking books. Good knowledge of the country; expectations may be mixed Likely to book some or their entire trip through tour operators, as full 'off the shelf' package or a tailored package. Within

		Mostly medium to high affluence	teambuilding component to trekking trips.	this group there may also be some element of self organisation
Domestic and regional breaks High growth in GDP per capita is resulting in a growing domestic middle class with growing travel means The expatriate sector is large with a substantial expendable income	Main motivation is to get away from the stresses and strains of everyday work and family life, spend quality time relaxing and enjoying the good things in life Some may link this with a religious festival or event Mostly independent but will consider the travel channel with discounted pricing in mind	Affluent Ethiopian families with young children Expatriate population based mainly in Addis Aged 35-55 Traveling as small and larger domestic families (4-8 people) or individuals/ couples of expats (expats)	Relaxation along the lakesides, including soft activities like browsing, shopping, boat rides, visits to evening entertainment Mostly socialising with family and friends Expatriates may be more active and in need of experiential travel	Influenced by word of mouth, press coverage, and TV programmes. Likely to do pre-visit planning via the internet and brochures Self-arrangement and bookings of through a local travel agency depending on price package offered
'Develop' segments Segments with high growth scope and which Ethiopia is not yet ready to receive and need to prepare for in terms of product variety, quality and services levels. Promotion mainly aimed at attracting and educating foreign tour operators dealing with these segments, creating awareness through travel media exposure and expanding the reach of online marketing channels. Apply around 30% of promotion resources to target and attract these segments over the next five years				
Intrepid explorer Currently limited-sized leisure touring market expected to grow as awareness of unique	Confident 'hard' exploration - looking for the 'real' Ethiopia, in search of extraordinary experiences will be prepared to go the	Will have travelled to Sub Saharan Africa before and other 'off the beaten' track destinations in Asia and South America.	Cultural and environmental interaction (in its broadest sense). They will be looking for community-based experiences and engagement with locals (trying coffee, chat, etc.).	Influenced by word of mouth, internet and social media. Substantial pre-visit planning via the internet and travel guides like

experiences and routes increases USA, Europe	extra mile, go to less visited places and sacrifice comforts to do so Largely independent and draws on guide books, internet and local knowledge to plan and execute their travels	Primarily aged 25-45 Unlikely to have children Length varies – from 14 days to a month or longer Typically travelling as a couple or with a small group of friends Well educated, well read and adventurous Range from budget backpacking to affluent with high disposable income – in both instances travel is a key way of life	Quality and nature of hotels, catering, guiding, etc. not a particular priority, prepared to have basic service levels if the experience is right Locations: Prioritise and look for specific out of the ordinary experiences e.g. hiking in the Simiens, going to the Danikel, cycling the Highlands, climbing the highest rock-churches, staying with a local community, exploring the origins of coffee, etc. May touch on main circuit but then also exploring deeper in local community Active segment although not motivated or dominated by special interest, specialised activities	Lonely Planet, Bradt, etc. Significant knowledge of the country of visitation; will know what to expect and have a good understanding of the country's culture and contemporary news / events Tend to self-package and book their own trip and possibly utilising ground handlers / transport operators / guides either in country. May use specialist tour operators to purchase certain activity elements of their journey
Adventure sport enthusiasts A collective segment of small, niche adventurous outdoor sport activity interests From all over based on common interest but more likely from USA, Europe	The appeal is undertaking a specific activity in a new landscape and destination. There is often a significant element of skill and risk involved. It's partly, but not always, about the bragging rights regarding the uniqueness of the	This is a wide group – the common area is the activity but these, and visitor characteristics, will vary They are likely to undertaken activities in other relatively exotic locations previously but not necessarily in sub-Saharan African. Aged 35-45.	Key motivation will be the particular activity. A key segment to consider for targeting is marathons/long distance running, cross country/trail running or endurance racing, building on the well established image of Ethiopia delivering world class long distance runners. High altitude training centres could be developed to attract competitive athletes for training	Influenced by word of mouth and social media groups (peers will be very important), and wider reading (special interest books / guides / magazines) and documentaries. Substantial pre-visit planning via the internet, peer advice, and guide books / specialist books.

	experience. Often need advice and support from specialist niche operators or local colleagues/clubs .	Group composition could be individuals (booked with a small group), and groups of friends / clubs. Generally well educated Medium to high affluence	purposes and running events could be staged for cross country running, triathlons, urban running etc. Other niche segments to consider for targeting and expansion include touring cycling, off-road motorcycling, mountain biking, overlanding, climbing, and possibly canoeing or kayaking For some groups this may be the only interest (particularly if there are logistics in terms of transporting equipment). For others sightseeing and culture will be important components – probably as a separate adjunct. Locations: Mostly mountains, rivers and other challenging topographies Like trekkers there may also be a charity and teambuilding component to these trips	Their pre-visit knowledge of Ethiopia will be moderate to good. Their pre-visit expectations will be mixed. They are likely to be booking some of their trip through very specialist niche tour operators.
MICE (Meetings, Incentives, Conventions and Exhibitions) delegates See detailed MICE Strategic Recommendations	Meet and discuss with global and regional peers issues of mutual concern, preferably in a professional and interesting environment with	Professionals and business people May or may not have been to developing countries Range in age from 35-60	Key motivation is convenience and professionalism or venue and services. Suitable air and road access and meeting venue, equipment and support services like hotels, transport, meals etc. of key importance. Exotic and	The MICE distribution channel is outlined in *(Addendum D)*, with associations/corporates as clients, working with meeting planners, professional conference

(Addendum D) A growth segment in Africa, with major potential for Ethiopia given good air links and intergovernmental presence	opportunities for local, high quality experiences Need highly professional services, advice and organisational support	Conferences and meetings sizes range from 25 – 5000+, with the majority below 300 delegates Affluent in money terms but poor in time availability	interesting location is a key factor once the primary boxes have been ticked Locations: Addis Ababa, smaller regional and local conferences in other cities	organisers, conference centres and other suppliers in the MICE destination
'Leverage' segments Segments with limited growth scope beyond the current levels of visitation, which Ethiopia has traditionally received and is ready to receive. The focus will be on extending the stay into other areas beyond the traditional destinations for these segments and to extract additional expenditure per visitor, through travel trade and online education and information provision. Apply limited (10%-15%) resources to target and attract these segments over the next five years				
Ethiopia diaspora A substantial, mainly Visiting Friends and Relatives (VFR) segment that will visit Ethiopia largely by default and should be made aware of the many travel opportunities on offer	To spend time with friends and relatives, with holiday travel as an add-on to their visit. The majority prefer semi-independent travel with similar needs to the Tailored Explorers - looking for somewhere different but more experienced and want to delve deeper and veer off the traditional circuit A limited number will invest in special	Strong links with local relatives and friends who know Ethiopia well Aged 30+, often traveling as family groups with children or friends Affluent and less price-conscious 10-14 days, with short leisure breaks of 5-7 days Typically as a small group of friends and/or family Well educated, well read and emotionally attached to the destination,	Unique historical, cultural, environmental, scenic experiences, both key sites but also lesser-known experiences Affordability ranges from budget to high quality and special experiences at hotels, catering, guiding, etc. Locations: Main circuits and all other areas where families or ancestors may have resided Getting heavily involved in the culture of Ethiopia – visiting markets, coffee houses etc.	Influenced mainly by word of mouth through friends and relatives, internet and social media. Significant knowledge of the country; will know what to expect and have a good understanding of the culture and current news / events Tend to self-package and book their own trip and possibly utilising ground handlers / transport operators / guides in country. May use specialist tour operators to purchase certain activity elements

	interest travel and 'hard' exploration	wanting in-depth information		
Birders (See *Addendum E* for a detailed profile) Currently an small but healthy and growing segment and very well suited to Ethiopia From all over with birding as common interest	Specialise in bird watching, have most probably travelled to many environmental and birding destinations. In search of special bird sightings and endemic species Need advice and pre-arranged itineraries based on local knowledge to get the best out of the birding experience	They are likely to undertaken bird-watching trips elsewhere in the world but not necessarily in sub-Saharan African. Aged 45+. Group composition could be individuals (booked with a small group), and /or groups of friends / clubs. Affluent	The appeal is about seeing new endemic species (and other wildlife – but primarily birds) – adding them to the 'list'. The key motivation and activity will be bird (and wildlife) watching. Locations: Simien and Bale Mountains, Awash National park, Lakes of the Rift Valley For some groups this may be the only interest. For others sightseeing and culture will be important components for this group – probably as a separate adjunct.	Influenced by word of mouth and social media (peers will be very important to this group), and wider reading (birding books /guides / magazines) and documentaries. Some pre-visit planning via the internet and guidebooks, peer advice, birding books, etc. Limited to moderate knowledge of the country, with high expectations for birding Likely to book their entire trip through a very specialist niche tour operators. For a club or existing groups, it may be a be-spoke package
Business extension Business travellers comprise the largest proportion of arrivals; some could possibly extend their stays for leisure purposes	Leisure desires will be across the various segments identified above	Economically active, male dominated segment. 30-55 years Travel individually or in small groups of 2-4	The reason for leisure travel will be to experience some of the best elements Ethiopia has to offer in a short break of 1-3 days, depending on interest Locations: on main circuit or in close proximity of Addis	Word-of-mouth through local corporate sector; information through Ethiopian Airlines, news coverage, etc. Internet very important Book with local operators

Addendum C: Online Marketing Strategy

Importance of a digital marketing approach for DMOs

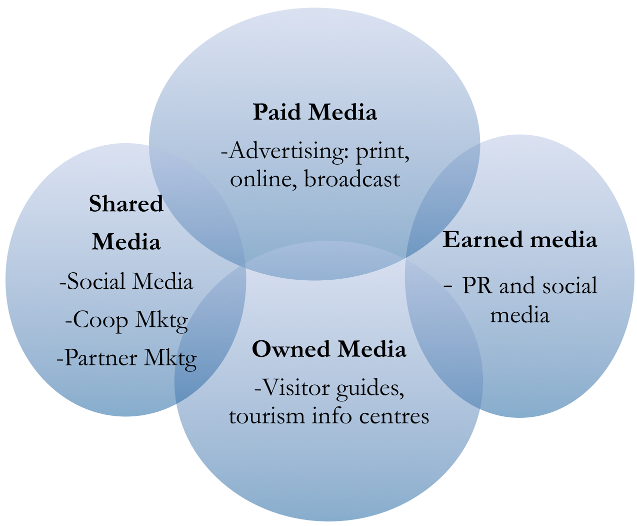
Digital technology has emerged as the epicentre of the tourism experience[25] driving Destination Marketing Organisations (DMOs) to integrate their online and offline marketing activities to reach increasingly digital-savvy consumers.

According to the Destination Marketing Association International (DMAI), DMOs are increasingly making significant investments in digital marketing, integrating their online activities, especially social media, into their overall marketing efforts. Banner ads and search engine marketing dominate the online spending landscape, and almost all DMOs which participated in the organisation's *2012 DMO Marketing Activities Study*[26] said they were present on Facebook, Twitter and YouTube.

This is in response to the growing consumer trend towards travel decision-making based on online information.[27] The rise of the Smart Consumer – digital natives and Internet experts – who are increasingly empowered to build personalised travel packages and expect to get and share information while travelling.

These travellers consider themselves explorers, not tourists, and seek authentic and unique experiences such as those offered naturally by a destination like Ethiopia. They are hyper-connected, demand constant engagement and expect interaction, on a level that can only be delivered online.

Figure C1: Integrated Marketing Approach



Source: Destination Marketing Association International

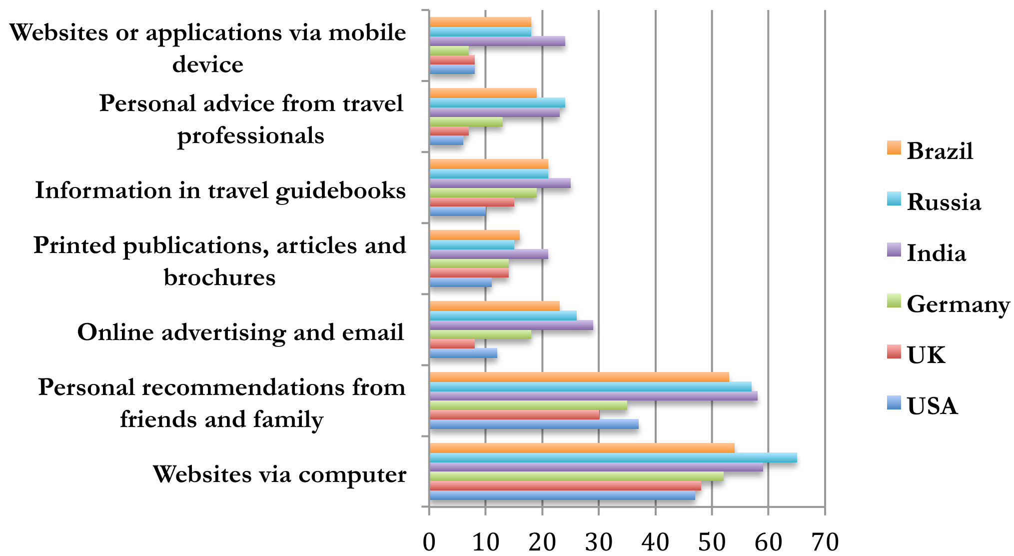
[25] Modiano (2012) The destination marketing landscape: the role of DMOs
[26] Modiano (2012) The destination marketing landscape: the role of DMOs
[27] Psarros (2013) Integrated destination marketing and the future DMO

Today's DMOs are in the inspiration business and their priorities need to be on meeting the traveller's needs in the right place with the right content at the right time. Unlike with traditional DMO marketing, the new traveller expects a complete, an integrated marketing experience, including earned media, web, PR, trade, traditional and online marketing. This requires DMOs to focus on the whole experience, but pay particular attention to customer satisfaction and engagement.

Importance of developing a strong digital strategy for Ethiopian Tourism Organisation (ETO)

In an online world where traditional and digital media converge and customers are constantly bombarded with an extensive array of marketing information, Ethiopia has to stand out from the crowd and grab attention by building relationships and engaging with travellers in the new spaces they are playing in, including mobile, social and online.

Graph C2: Information Sources of Decision to Visit the Destination



Source: PhoCusWright[28]

ETO has to think of integrated marketing opportunities, seeking the "optimal match" of messages with channels, platforms and devices (UNWTO 2014). ETO has to be where the consumer is, instead of trying to convince the consumer to come to it. The organisation has to leverage the conversations of others, instead of trying to exert control over them.

Special focus must be given to shared media and earned media, including User Generated Content, information contributed by individual users of a website or online platform, not the owner of that online platform.

To differentiate itself and grab attention, ETO needs a strong digital and content marketing strategy - with a reliable, dynamic website as its hub and the skills and resources to execute it.

Steps to creating the digital marketing strategy will include:

[28] PhoCusWright (2012) Empowering Inspiration: The Future of Travel Search

- **Formulating your message:** What do I want to tell my source markets? Develop themes in line with the brand story you're trying to tell, e.g. Ethiopia is where it all began…
- **Choosing the right platform:** Which digital platforms are my source markets using? Once you have decided on these, deliver your story themes – Ethiopia is where it all began – across multiple channels. Develop conversations and engagement.
- **How will I engage with them:** Create a content calendar that shows your marketing efforts across the channels you have identified and be consistent in its application. Your content calendar could include photos, videos, blog posts, social media posts, user-generated content and articles
- **What goals am I hoping to achieve**: Assess your digital marketing goals, e.g. engagement, and measure them regularly, tweaking your activities to achieve success

Among the benefits of digital marketing is its highly measurable nature ensuring that ETO can measure its success and make changes to its marketing as and when required. The implementation of this online strategy must focus on three key evaluation areas:

- **Awareness:** Site visits, time spent, pages viewed, search keywords, click through rates and bounce rates
- **Actions:** Brochures taken, newsletter sign-ups, product search, video views, gallery views and downloads
- **Advocacy:** Expressing opinions, comments and posts, content sharing and posting on other sites

Digital marketing strategy for ETO

Goals of digital marketing for Ethiopia

Among those goals pursued by ETO in its online marketing strategy are:

- Raising awareness of Ethiopia and its regions' unique and diverse heritage and cultural assets, its striking landscapes and welcoming people.
- Significantly grow ETO and its regions' online community in target markets.
- Increase the amount of and disseminate accurate, inspiring and engaging content about Ethiopia and its regions to inspire target markets to travel to the destination.
- Unite trade partners in one integrated, focused marketing effort to grow awareness about the destination, its brand and travel opportunities.
- Foster, leverage and share the pride that Ethiopians have for their homeland.
- Capture and promote diverse aspects of the destination in a cost-effective manner.
- Reach online travel markets normally not reachable through traditional marketing efforts, putting the traveller at the heart of all online marketing decisions.

Components of an integrated digital marketing strategy

Components of this integrated digital marketing strategy for ETO should include, but not be limited to:

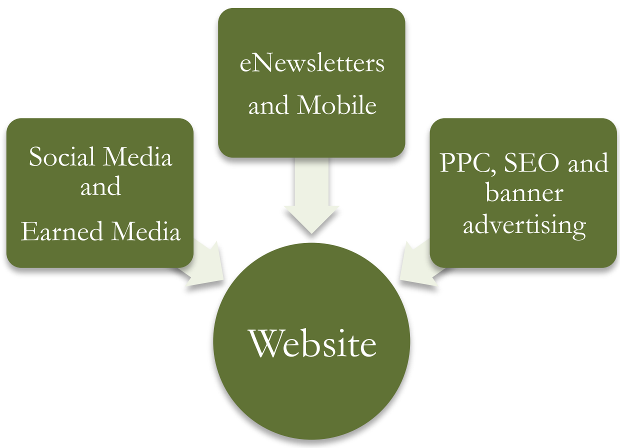
- A strong set of national and regional tourism websites employing best-practice DMO web techniques as outlined below with dynamic content offered in several languages.
- A strong focus on generating dynamic, engaging, informative and reliable content – visual and text for use across ETO's online platforms.
- An updated and maintained trade and consumer database in key source markets.
- A B2B website section including a brand toolkit, trends and statistics, content that can be used for ETO's marketing initiatives, and online destination training in the form of a destination specialist programme.
- An online PR and media plan including updated media database – consumer, trade and travel bloggers – in key source markets.
- Joint online marketing arrangements encouraging key trade partners to 'share' Ethiopia content and market Ethiopia and its regions in a coordinated manner.
- Social media platforms whose design and consistently updated content reflect the brand, destination goals and traveller's needs.
- Affiliate partnerships with national influencers and international online influencers.

Digital focal point: Ethiopia national and regional tourism websites

With many of Ethiopia's strategic markets relying heavily on online information for travel decision making, ETO must launch national and regional websites that reflect the new brand's visual identity and include best-practice functionality and dynamic, accurate, updated visual and written content that inspires and engages prospective travellers.

The national and regional tourism websites are the focal point to which all online marketing activities, PR, email marketing and social media should be directed and should provide quality dynamic information that can be repurposed and disseminated across a full range of the promotional mix.

Figure C3: Websites as a content hub for digital marketing efforts to direct traffic to



Content creation for ETO's online platforms

According to UNWTO (2014), online marketing is very much about the marketing of content, i.e. "getting the right content in front of the right person at the right time on the right device at the right point in their decision-making process to drive the right action".

In online marketing, content is king, but visuals reign[29], especially in travel marketing where photos and videos on a website truly sell a destination. This is since most journey planners will visit multiple websites and refer to user reviews to plot their trip. In a destination like Ethiopia, which has so much to showcase visually, the destination's exotic and inspirational appeal would be effectively captured through photos and videos. Creating a visual imprint cuts through the clutter[30].

The content generated across all platforms should have the interests of the traveller at heart and promote the destination and its assets, not fulfill the corporate communications mandate of ETO. Content development should reinforce Ethiopia's brand.

Significant resource shortages require ETO to think strategically about the type of content to create and how this content can be repurposed in multiple formats for use across its digital platforms, i.e. create once, use multiple times in different formats across a variety of digital marketing platforms.

Figure C4: Repurposing content across the promotional mix

[29] Skift (2015) Travel brands look to Instagram for the influencer bump
[30] AMC (2015) Cape's tourism marketing bonanza

Online Marketing Platforms

Online marketing tools that ETO should leverage to showcase its brand identity in an integrated manner include:

- **Blog:** Assists with SEO and provides a hub for dynamic content such as Top 10 destination picks, travel advice, etc. that can be repurposed for other digital platforms.
- **Facebook and Google+:** Tools for building relationships with destination ambassadors and extremely targeted advertising to prospective fans.
- **Twitter:** Quick and comprehensive. Good to get the message out speedily and for hearing what people are saying about the destination brand. Hash tag campaigns that are well planned and executed can be a powerful means of driving brand awareness.
- **Pinterest and Instagram:** Images drive travel decisions. DMOs have successfully used # Instagram visual campaigns to generate interest in their destinations.
- **YouTube:** The second most-used search engine in the world and an especially good platform to promote travel through the powerful media of video.
- **Foursquare and Facebook Places:** Leverage the trend of '*smoasting*' (a term describing the tendency to boast on social media) with user check-ins on Foursquare and Facebook Places and rewarding visitors for checking in with a brief suggestion of something to see.
- **Remarketing and PPC:** Use remarketing to show your ads to users who have previously visited the website as they browse the Web. This is an extremely powerful form of banner advertising because it is a very targeted form of marketing. PPC for its part is far quicker than SEO in its ability to direct Google searchers to your website, but it can be expensive especially if your keywords are very competitive.
- **SEO:** Mastering SEO is a long-term and ongoing strategy, but success is the placement of your website at the top of Google's search results, an enviable position to be in and as a DMO that's where your website should be for destination searches.
- **eNewsletters:** Still an important component of the promotional mix allowing ETO to remind visitors of the destination and build loyalty through latest Ethiopia information, events and offers and drive traffic to the website.
- **Mobile:** Offers direct communication regarding tourism information, ideally with the provision of an app or mobisite providing useful information on the destination while they are travelling, including an offline map, travel information, currency converter, Wi-Fi spots, weather, etc., but also through provision of 24/7 emergency tourism number delivered through text on arrival.

ETO should select and focus on those digital platforms most likely to reach its target source markets and segments instead of trying to focus on all. Less successful DMOs have a tendency to launch across all platforms and fail to keep them updated with useful, informative and inspirational content, which in turn detracts from their brand image. Not only will these platforms need to be populated consistently taking in to account the destination's brand identity, there will have to be constant engagement and measurement to ascertain their success.

Influencers and user-generated content

Successful digital marketing-focused DMOs such as Tourism Australia and South African Tourism are increasingly leveraging the power of user-generated content across their digital platforms. In the case of South African Tourism, the DMO's social media platforms and in fact the official website acts as a showcase for content tagged #meetsouthafrica, generated by visitors to the destination and influencers such as prestigious travel bloggers who enjoy large and loyal audiences.

Like these leading DMOs, ETO must embrace tools to monitor the chatter across all key platforms on which their respective source markets can be found, engage with these digital ambassadors, and leverage Ethiopia tourism content on their own platforms.

As indicated in the situation analysis, Ethiopia already enjoys a great deal of user-generated content created by tourism fans who post positive content about Ethiopia across all major social media platforms despite the poor Internet infrastructure. ETO should leverage these existing conversations instead of trying to create them, and this includes working closely with travel bloggers within the destination and from key source markets who have strong networks of prospective travellers that could be targeted to visit the destinations.

ETO should place emphasis on authentic storytelling and act as an initiator, facilitator, and guide in online conversations, as opposed to driving them. It acknowledges that nobody is interested in what a DMO says about a destination but when a DMO creates a platform for stories by local people, top bloggers and travellers, visitors are enticed to experience the destination for themselves[31].

To keep abreast of international DMO trends and leverage learnings made by other DMOs in the area of destination marketing, it is suggested that ETO joins a tourism association like Destination Marketing Association International (DMAI).

Phased Approach: Digital marketing strategy

Phase One: The Building Blocks

a) Create excellent national and regional websites as digital focal points for destination marketing

Ethiopian Tourism Organization is encouraged to discard its dysfunctional tourism website and those of each Ethiopian region and create entirely new national and regional destination websites incorporating global best-practice functionality and well-written, informative, reliable content.

While regional brands must be distinctive, national and regional brands should share brand architecture, reflecting at least some of the national 'umbrella' brand values and bear some resemblance to the parent national brand[32]. The same can be said for the structure and style of both the national and regional websites.

The destination websites of Ethiopia's tourism regions should be standardised from a functionality and visual standpoint so that they 'fit' within the overall national tourism brand. These websites need to resemble in some way the national website's look and feel, but also take in to account each region's idiosyncrasies.

Critical success factors for Ethiopia's national and regional tourism websites include:

- Easy navigation and logical structure

[31] Govender, I (2015) Travel Bloggers who take you places
[32] UNWTO (Date Unknown) Handbook on Tourism Destination Branding

An analysis of Ethiopia's national and regional tourism websites in the table below indicates that these include very few of the critical success factors defined above as essential for DMO websites.

Table C1. National and regional tourism websites' current functionality in relation to best practice requirements for destination website.

	Ethiopia	Tigrai	Amhara	Oromia	Addis Ababa	Southern nations
Logical Navigation	x	√	x	√	x	x
Brand recognition	x	x	x	x	x	x
Reliable, well-written content	x	x	x	x	x	x
Tourism news and advice	x	x	x	x	x	x
Maps and itineraries	x	√	x	x	x	x
Product Database	x	x	x	x	x	x
Email newsletter sign-up	x	x	x	x	x	x
High-Quality multimedia	x	x	x	x	x	x
User-generated content	x	x	x	x	x	x
Trade section	x	Not functional	x	x	x	x
Interactivity	x	x	x	x	x	x
Multiple languages	x	x	x	√	x	x
Social media, incl. Blog	x	x	x	√	x	x
Working links	x	x	x	√	x	x
SEO	x	x	x	x	x	x
Google analytics	x	x	x	x	x	x
Mobile responsiveness	x	x	x	x	x	x
Customisation	x	x	x	x	x	x
Bookability	x	x	x	x	x	x
Promote destination, not DMO	√	√	x	√	x	x

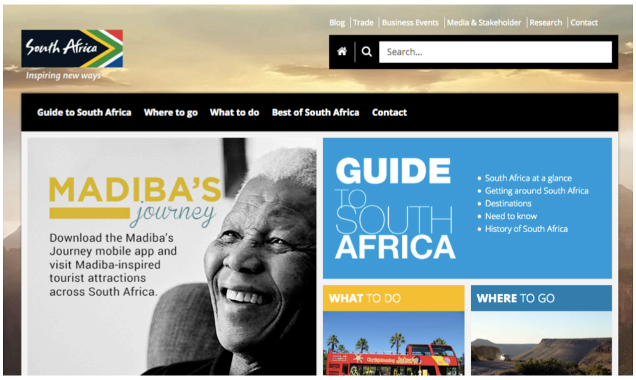
It is recommended that in the development phase of the national and regional Ethiopia tourism websites the critical success factors that have been defined as best practice are incorporated so that Ethiopia's online hub is competitive with competitor DMO websites and emerges strongly within the cluttered online tourism marketing space.

DMO websites must act as the hub to which all many marketing activities and online conversations, not only those conducted by ETO, but also by stakeholders and travellers, are directed. As such it is essential that ETO's national website and the regional tourism websites incorporate best-practice DMO functionality to encourage and leverage these conversations.

Text Box C1: Aligning national vs regional brand websites

Brand South Africa has very strong guidelines linking the national South Africa brand to that of the country's provinces that Ethiopia could draw upon for inspiration. According to Brand South Africa, the province takes strategic direction from the primary brand when communicating with an international audience.

Not all of South Africa's provinces have extended this to their tourism websites, but provinces such as Limpopo Tourism, Eastern Cape and Tourism KwaZulu Natal have aligned their websites with that of South African Tourism's website in terms of style, look and feel, and logo, providing some level of consistency across the digital platforms promoting the destination and ease of use for tourists seeking information about Ethiopia and its regions.

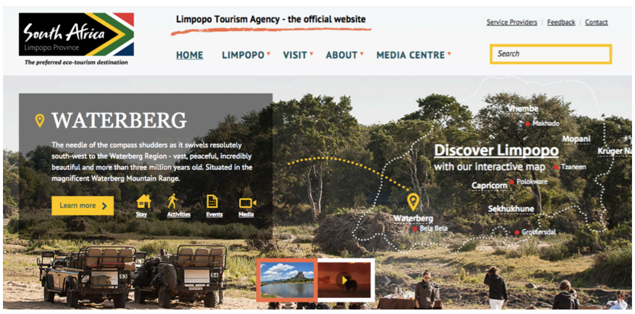


South African Tourism

⇓

Tourism KwaZulu Natal

⇓



Limpopo Tourism

b) Create and populate national social media accounts

The situation analysis section of this study outlines the key source markets within Europe (UK, Germany, Italy, The Netherlands and France) and Middle East. Large volume markets such as the USA, India and China have limited penetration although the USA remains the largest single market and should not be ignored in the first phase of the digital marketing strategy.

With the practicality of the limited and untrained resources available to employ this digital marketing strategy, it is proposed in this first phase to limit the creation and population of social media accounts to national accounts and delay creating digital accounts for Ethiopia's regions until the national brand can be established online. Social media platforms where these source markets are typically engaging include, but are not limited to:

- **YouTube:** Recommended to showcase Ethiopia's impressive landscapes, culture and heritage.
- **Twitter:** Recommended by virtue of its ability to leverage the existing conversations taking place by destination fans and the potential for hashtag campaigns and marketing.
- **Facebook:** Recommended due to its popularity within Ethiopia's key source markets.
- **Instagram:** Recommended to showcase Ethiopia's impressive landscapes, culture and heritage, as well as its potential for hashtag campaigns and marketing.
- **Google+:** Recommended for its influence on SEO
- **FlickR:** Not a priority in this first phase
- **Pinterest:** Not a priority in this first phase
- **LinkedIn:** Not a priority in this first phase
- **Tumblr:** Not a priority in this first phase

Critical success factors for Ethiopia's national digital marketing platforms include:

- Establish a long-term vision, as social media marketing is never a once-off.
- All activity on all digital marketing platforms should be connected to the overall goals of the digital marketing strategy.
- Define a social media roadmap that links the digital marketing goals to specific social media initiatives throughout the three-year period.
- Establish governance and guidelines. Who will be responsible for maintaining social media activities and what are the guidelines in which this must be conducted? What training and capacitation is required?
- Authentic, honest storytelling about the destination, whether this content is generated by ETO, influencers, locals or visiting tourists should be a priority.
- Social media platforms should be updated and monitored regularly, and engagement by fans leveraged.
- ETO should not try to invent or control the conversation. Rather a more successful approach lies in joining an existing conversation.
- Employ an integrated, holistic approach to social media so that it is incorporated within and contributes to your marketing strategy instead of being a separate silo.
- Secure trade and stakeholder support for and understanding about your social media initiatives.

c) Create and grow a digital database for email marketing

Tourism demands the fostering of relationships with visitors through personal and professional dialogue. Permission-based email marketing, because of its direct, flexible and personalised nature, is the most relevant and effective channel through which to foster these relationships, appealing especially to visitors who may already be searching for options[33].

Having opted in to receive information, visitors are more likely to be responsive to a destination's email marketing messages. However, with the vast multitudes of destinations all competing for a slice of the market, it is essential that ETO optimise its email marketing messages to stand out from the crowd.

As such, not only should the new website include newsletter sign-up functionality, website visitors should be give the option to select specific interests as part of the signup process to ensure that the email marketing message sent to them are optimised for their interests, which is a great deal more powerful than sending generic newsletters.

There are several open-source CRM solutions that are free or cost-effective, and that can be adapted for the purposes of the ETO. The most popular and flexible open-source platform is Sugar CRM (www.sugarcrm.com) which can be tailored and built upon to create a robust CRM system for destination marketing purposes.

Other CRM providers include:

- FreeCRM (https://www.freecrm.com/) which offers a free account for up to 100 users and 100 000 contacts. This CRM has one of the highest limits of free users and contacts than other free CRM solutions in the market.
- Hubspot CRM (http://www.hubspot.com/crm) was built by marketers specifically for marketing purposes. The system may not be robust enough for the purposes of ETO, but its associated Salesforce CRM (which comes with charges) is more robust with deep levels of CRM functionality.
- Simpleview (http://www.simpleviewinc.com/) is designed for use by DMOs.

The critical components for selecting a DMO CRM include:

- A simple interface
- Intuitive process that don't require extensive training
- Cloud based access
- Report building
- Advanced searchers
- Segmentation and profiling capability
- Opt-in data protection

Initiatives should be employed throughout the three-year period to grow the database.

Critical success factors for ETO's email marketing includes:

- Segmented database so that targeted content can be delivered according to a subscriber's specific interests regularly.
- Visible, functional newsletter signup form on destination website and social media platforms.

[33] Digital Fire (2010) The importance of email marketing in the tourism industry

- Encourage current email subscribers to forward emails by including social sharing buttons and "Email to a friend" button.
- Run promotions in conjunction with affiliates such as Ethiopian Airlines to encourage additional newsletter signups.
- Run online competitions through the national tourism website and across social media platforms to increase signups.
- Incorporate incentives or offers: Benefits that the recipient gains from clicking on the hyperlink in the email.
- Optimise timing of sends: Measure opening of newsletters to devise optimal day, time of sends for future campaigns.
- Integrate email campaigns within your overall marketing strategy. Should not exist in a separate silo.
- Measurability ensures that the creative, content, call to action can be optimised to hit ETO markets' sweetspot.
- Optimise landing pages: Ensure that upon clicking a link the user reaches a functional page that meets any expectations they may have had when clicking that link.

d) Content drive to devise brand-appropriate content for all websites and social media platforms

To feed its online focal points – the official national ETO website and the regional tourism websites – as well as ETO's various digital promotional platforms such as Facebook, YouTube and Twitter, ETO needs to incorporate content development within its digital marketing strategy to generate well-written, informative, engaging content that will inspire its online communities to visit and engage with its website.

ETO should not, however, be regarded as the sole provider of content. Content generated by its trade partners, national influencers, locals and visiting business and leisure tourists should be leveraged across ETO's national and regional online platforms.

ETO's content drive should incorporate themes around the brand identity, i.e. content development that showcases Ethiopia as the source, the origin, the place where it all began. A regularly updated content calendar will need to be created and maintained throughout the strategy reflecting the brand's identity.

In addition to using the content developed in the content drive for its own purposes, ETO should find partners and engage in the conversations to leverage their networks. With the launch of new national and regional tourism websites, there is an opportunity to generate informative content that should be used to populate the new website and also be repurposed for use across the promotional mix, not only by ETO but by all parties involved in the promotion of Ethiopia.

A dedicated content manager or editor should be responsible for the consistent production, repurposing and dissemination of content that promotes the destination once the initial content drive is complete. Capacitation within ETO's marketing department will be required as well as assistance with the development of a content marketing drive and content production – images, video and text.

Critical success factors for Ethiopia's content drive includes:

  - Identify content themes that strongly reflect the destination's brand

- o Create once, repurpose in multiple formats and reuse across digital platforms
- o Leverage the content being created by other parties, e.g. user-generated content
- o Involve trade partners and other stakeholders in the creation of content
- o Content creation should be focused on meeting ETO's marketing strategy to inform and engage with visitors, and not to fulfil ETO's corporate communications mandate.
- o A content calendar should be created and updated to guide content development

e) Capacity building of all stakeholders involved in digital marketing for Destination Ethiopia

With digital marketing emerging as a key marketing focus for ETO, dedicated trained staff will be required to devise and implement ETO's activities.

It is recommended during the first phase of the digital marketing strategy, and to maintain world-class quality across all spheres of online marketing, that elements of implementing the online marketing strategy be outsourced to an external consultancy or consultancies. This may be expanded to the second phase if specialist online marketing input and expertise are required, e.g. SEO content, online marketing campaigns. Translations of content should be undertaken exclusively by first language speakers of ETO's key source markets throughout all phases.

The first phase of the digital marketing strategy also proposes capacitation for ETO's Marketing Department and key regional tourism officials to fulfill the new roles and responsibilities required to implement the digital marketing requirements. This capacity building should take the form of theoretical training from international experts and practical on-the-job application through the implementation of various activities outlined in this strategy.

To ensure clearly defined roles and responsibilities across these institutions, it is imperative that proper, detailed job descriptions including Key Performance Indicators (KPIs) and comprehensive and regular reporting against these objectives are completed.

Examples of KPIs in this new environment include:

- Digital Marketing ROI
- Site traffic
- Social Media reach
- Organic search
- Brand engagement
- Influence response
- Mobile leads, traffic and conversion rates
- Campaign exposure and evaluation
- Destination awareness, image and preference

The ETO digital marketing staff will require strong digital and content marketing skills and capacity. Among those skills requirements will be:

- Creation and execution of digital marketing plans and budgets;

- Monitor and report on marketing challenges and successes;
- Analysis of tourism statistics and trend reports to direct digital marketing activities;
- Build and maintain productive relationships with private sector tourism stakeholders and associated public-sector partners;
- Ensure the ETO brand is woven into all digital communications to create brand awareness, brand loyalty and preference to Ethiopia;
- Excellent project management skills;
- Coordination of joint trade digital marketing activities;
- Understanding of the promotional mix and integrated marketing campaigns;
- Understanding of social media, online and content marketing and user-generated content;
- Excellent written and spoken English;
- An understanding of source markets and target segments.

f) Free Wi-Fi provision in key tourist areas

The low Internet penetration throughout Ethiopia, especially in rural areas, means that any social media strategy that includes an element of User-Generated Content will be difficult to implement without providing Wi-Fi, and preferably free Wi-Fi, access in key tourist areas where Ethiopia and its regions wish to encourage tourists to share content about their experiences with their networks.

The strategy suggests the roll out of Wi-Fi hotspots in Ethiopia's main tourism areas or to improve the cost and accessibility of local SIM cards and data packages not only upon their arrival at ports of entry, but also in key tourist areas. Several cities throughout the world have recognised the importance of Wi-Fi provision and have converted telephone booths in to Wi-Fi hotspots for example. Ethiopia and its regions have the opportunity to leapfrog landline technology and provide Internet through mobile phone technology.

Furthermore, hotels and restaurants should receive subsidies for Wi-Fi provision to their guests. Ideally this should be free access and can be capped at a certain amount if resources are limited.

Phase Two: Engagement and Promotion

a) Trade partnerships in Ethiopia's digital destination marketing

To ensure the success of ETO's digital marketing strategy it is essential that key trade stakeholders are guided on how, and in fact encouraged, to use the new Ethiopia Tourism brand in their own digital marketing initiatives and customer interactions.

If tourism stakeholders can market the destination using a united, coordinated approach, this presents Ethiopia with a competitive advantage, as the businesses are working together to achieve a common goal.[34]

Ethiopia must build and leverage trade relationships, locally and internationally, and invest seriously in this distribution channel to achieve coordinated digital marketing and enhanced awareness in key markets.

[34] Buhalis (2000) Marketing the competitive destination of the future

Critical success factors for the development of trade partnerships in Ethiopia's digital destination marketing include:

- An updated and maintained trade database in key source markets;
- A B2B website section on both the national and regional websites including a brand toolkit, trends and statistics, content that can be used for their own Ethiopia marketing initiatives, regular newsletters with updated destination news and an online destination training workshop, and
- Joint marketing arrangements encouraging key trade partners to 'share' Ethiopia content across their digital marketing platforms and market Ethiopia in a coordinated manner.

b) Mobile app technology to promote the destination

According to Triptale[35], tourists travel less prepared than ever with shorter notice periods. Their discovery, planning and booking has increasingly moved to mobile ensuring that among the DMO's greatest roles today, is to provide Internet. It must be possible to share anytime, anywhere.

Mobile is an effective way of creating destination fans, with some 52% using destination apps while visiting a destination. Among these visitors, 94% use mobile apps to research things to do and 80% for maps and directions.

The almost-universal use of mobile technology by visitors from Ethiopia's key source markets requires the provision of a free mobile app through which visitors can access key destination and tourism product information for Ethiopia.

Critical success factors for the development of a mobile destination app:

- Keep it simple, easy and most of all, free!
- Be contextual and relevant: Offering relevant content in the context of user's search is the key to make your app popular and interesting.
- Ensure it works across all operating systems
- Add value and information frequently
- Provide easy sharing capability
- Publicise its availability widely
- Clear and instant call to action
- Engaging user experiences
- Attractive design

c) Domestic digital destination marketing campaign

With its intensely proud nation and world-renowned ambassadors, especially in the realm of sports, an opportunity exists for Ethiopia to harness this pride through digital marketing initiatives and foster a spirit of wanting to share the uniqueness of the destination with all visitors.

Internet penetration is low (second-lowest in Africa[36]) however, and the largely rural make-up of the Ethiopian population ensures that any domestic tourism marketing strategy will have only limited success in the destination during the three-year strategy.

[35] Thygesen (2014) Mobile trends: how they influence travel and tourism
[36] Wikipedia (2015) Internet in Ethiopia http://bit.ly/1G77Vmb

That said, however, there are several very successful private-sector social media accounts with an engaged Ethiopian audience that can be leveraged, such as church group Facebook accounts for example. There is also a fair amount of existing engagement on such online platforms as Twitter and Instagram by Ethiopian citizens and influencers who can be encouraged to participate in a digital domestic tourism campaign.

The hashtags #ExploreEthiopia and #VisitEthiopia are already prolifically used on both platforms by locals and international visitors and as per best-practice it makes sense to leverage these in any digital tourism campaign embarked on by ETO.

Due to the limited access to Internet among the domestic population, the strategy proposes that the focus be on an international digital marketing strategy with elements that can be extended to domestic tourism promotion, i.e. encouraging user-generated content about Ethiopia's tourism assets across social media platforms tagged #ExploreEthiopia.

To foster national pride and create awareness about the destination's tourism opportunities, locals, local travel trade and local celebrities must be encouraged to share their Ethiopia experiences related to *Ethiopia's* tourism assets (see below international campaign) through their social media accounts using the #EncountertheOrigin hashtag.

ETO's role will be to engage with and leverage this local content across its own digital marketing platforms, as well as translate this into their traditional marketing, e.g. roadside billboards showcasing user-generated content; radio campaigns outlining locals' experience of the destination.

Digital initiatives to foster domestic tourism growth should not be regarded as separate to other forms of traditional domestic tourism promotion. Rather they should be used to further enhance traditional initiatives to grow local travel.

d) International digital destination marketing campaign

In the second phase of the three-year digital marketing strategy, ETO will employ an international digital destination marketing campaign entitled *Encounter*, aimed at creating awareness about, and encouraging travel to Ethiopia's tourism assets that embody the brand identity of '*the source*', e.g. the source of the Nile.

The assets will be linked to create an official tourism route that will be promoted as a 'bucket-list' itinerary for explorers of Ethiopia and trade partners will be engaged to assist in the packaging and promotion thereof.

The international digital marketing campaign will incorporate, but not be limited to:

- A special *Encounter* landing page on the ETO's national and regional website detailing the route, trade partners involved, key facts, multimedia, blog posts, user-generated content, etc.
- The hashtag #*ExploreEthiopia* will be employed to tag all content generated by influencers, travel bloggers, locals and visitors. This content will be leveraged by ETO across its social media networks and on its destination websites.
- Travel Bloggers will be enlisted in Phase 3 of the digital marketing strategy to experience and blog about *Encounters.* The content and social media interest they generate will be leveraged across ETO's networks.
- Special travel packages for the route will be devised and promoted by key trade partners.

- ETO will initiate sharing opportunities at these key assets: Props that prompt visitors to take photos and share, i.e. I discovered the origin of the Nile #ExploreEthiopia. These physical sharing areas must have WiFi hotspot access. ETO will incorporate these posts within its website and across its social media platforms.
- At launch: The creation of a Facebook App or Game and Competition to create awareness about the route in the format of a treasure hunt. To enter, the user has to sign up to receive Ethiopia Tourism correspondence in future and complete the *Encounters* treasure hunt. The winner will win a trip with a partner to experience Ethiopia.
- At launch: Content marketing, email marketing and social media campaign will be employed for the launch of the route across all relevant social media platforms, and all traditional forms of marketing employed by ETO will feature the campaign. Trade partners will be given collateral to share with their networks.
- At launch: Globally renowned influencers will be identified to experience *Encounters* and share it with their respective networks. Their experiences will be incorporated within ETO's social media platforms and the national tourism website.
- The campaign will be developed and implemented within the period of a year.

Phase Three: Leveraging Affiliates

a) Creating affiliate partnerships with influencers

South African Tourism targets the decision-making process of planning a trip, providing useful visitor information and partnering with fulfilment partners like online travel agencies, e.g. Expedia who have an existing, loyal customer base.

There is an opportunity for ETO to learn from this approach and engage potential travellers in the spaces they make travel decisions, customising their information and advertising to increase the relevance of their message and making it more attractive and easier to book a trip online to Ethiopia.

The third phase of the digital marketing strategy advocates the partnering with online travel players like TripAdvisor, WAYN.com and Expedia, and supplementing Ethiopia's digital marketing through Google Adwords, Lastminute.com, YouTube, Opodo, E-Bookers, CNN and NatGeo.

b) Online PR incorporating Travel Bloggers

According to global research firm, Nielsen, over 90% of global consumers trust peer recommendations over advertising[37]. DMOs are leveraging this trend, employing influential travel bloggers to "recommend" their destinations to their considerably hard-earned networks.

The authentic stories about Ethiopia generated by locals and international visitors to the destination should be supplemented in the third phase of ETO's digital marketing strategy by an official Travel Bloggers strategy where influential bloggers with strong networks in key source markets are invited and commissioned to experience *Encounters*, blog about it and share it with their respective networks.

[37] Nielsen (2012) Global consumers' trust in 'earned' advertising grows in importance http://bit.ly/1fyoMzu

The real experiences offered on *Encounters* provide travel bloggers with the authentic storytelling their networks have come to expect. These travel bloggers will share in an unbiased, intimate, personalised, believable and inspiring way their first-hand experience of the tourism assets along *Encounters*, as well as Ethiopia's many other non-physical tourist assets such as the warmth and generosity of its people, the magical myths and legends and destination's authenticity.

The quality shareable content they generate will be leveraged across social media platforms, not only by their networks, but also by ETO on a special *Encounters* landing page featured within the national tourism website.

The use of Travel Bloggers is only one of the components supporting ETO's international destination marketing campaign entitled *Encounters* (as outlined above).

Addendum D: MICE Strategy

International research studies confirm that there are substantial and measureable economic benefits to be derived from a destination that attracts and hosts in-country business tourism events; a tourism pillar referred to internationally as the MICE (Meetings, Incentives, Conferences and Exhibitions) sector.

The economic value of the business travel sector is vast and growing. According to UNWTO, there has been a 53% improvement in international business travel over the past 10 years exceeding the overall (leisure) tourism growth rate of approximately 3.3% per annum. The sector is expected to grow by 4% in 2015 to US$ 1,222.3bn.

The conference and incentive travel segments are predicted to continue growing at a faster rate than any other tourism sector up to 2020 when revenues from international business tourism are forecasted to account for up to 45% of total international tourism income.

The MICE sector is consequently a powerful economic stimulator and has a far reaching economic multiplier effect. It is also a labour intensive industry that creates jobs; it is a significant earner of foreign exchange, generates substantial tax revenues for governments and stimulates small and medium enterprise development.

Research of international arrivals by purpose of visit indicates that Ethiopia's conference arrivals have risen by almost 60% over the past 5 years (2009 to 2013).

	2009	2010	2011	2012	2013
Business	71,374	77,816	91,064	130,329	123,600
Meetings, congresses	47,516	36,145	50,531	57,578	64,970
Total	118,890	113,961	141,595	187,907	188,570

Principal Characteristics of the MICE Sector

This sector has very different drivers compared to that of the leisure sector. The principal characteristics are:

- Promotes investment, trade, communications and technology
- Promotes other business sectors
- Resilient to economic downturns
- Promotes environmental quality and sustainability
- Brings education and professional development to the local community
- At the high quality, high yield end of the tourism spectrum
- Year round – thus sustaining permanent, full-time employment
- Complementary to the leisure tourism sector – relying on much of the same infrastructure

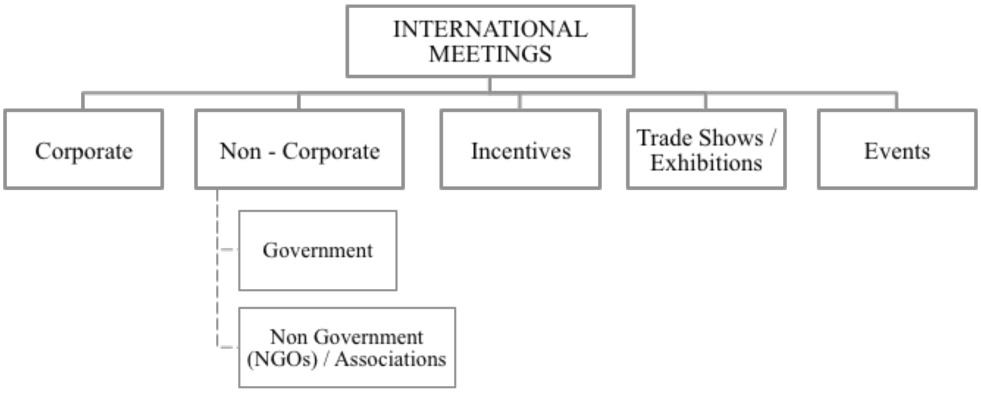
Investment in business tourism facilities leads to the regeneration of urban / inner-city areas. It helps stimulate future inward investment. Research demonstrates that

- 40% of delegates return with families as leisure tourists
- 19% of international delegates bring an accompanying person to a conference

MICE Value Chain

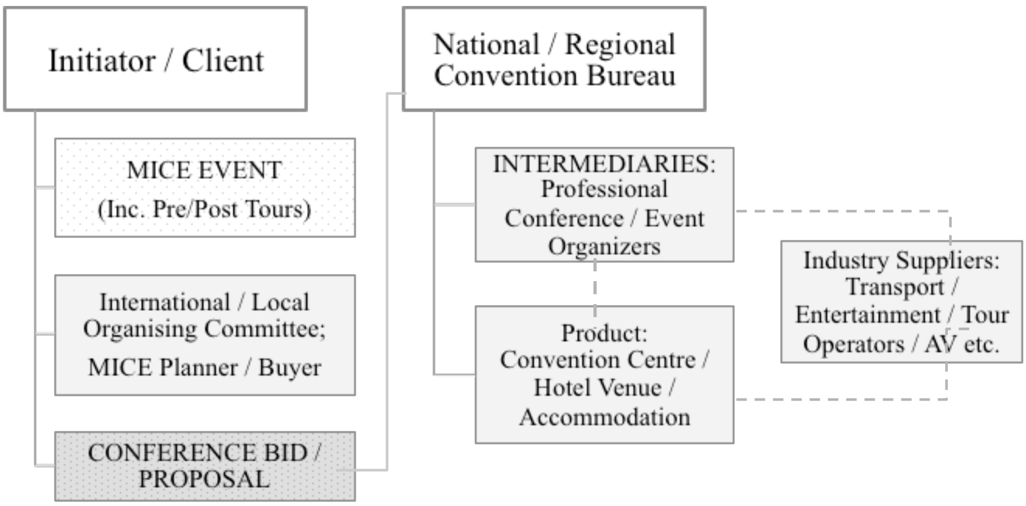
The value chain associated with the MICE sector is referenced below.

The main criterion to segment the business tourism / MICE market is via the initiator of the meeting. The initiator determines what kind of meeting is organised and in turn what supplier services are needed. When segmenting the international meetings market by initiator, two primary segments namely the corporate and non-corporate meetings markets can be defined:



Corporate	National, regional and international private sector corporations that generate meetings and incentive travel programmes
Non-Corporate	i. Governmental meetings ii. Non-Governmental meetings i.e. Associations (medical meetings, academic, trade organisations, professional bodies)
Incentives	A reward programme for corporate sales achievers – usually travel based.
Trade Shows / Exhibitions	A business-to-business platform at which (international) buyers interact with local suppliers (example the MICE East Africa trade show to be hosted in Addis for the first time in early 2016 will bring in hosted meeting buyers to meet with product suppliers i.e. venues and hotels)
Events	A large gathering of culture, arts or sports participants that can attract international participants or spectators

Opportunities for Ethiopia can be leveraged via corporate meetings and incentives in the short-term with the non-corporate sector providing excellent potential on a medium term basis. Associations in particular have demonstrated to be one of the most attractive segments because of their high spending delegates as well as their broader impact on the host destination. Knowledge transfer, inward investment, innovative partnerships and business deals are some of the added benefits that underpin these meetings resulting in more and more government support for infrastructure and marketing that can increase their country's share of this market and can help drive forward their economic development agendas.

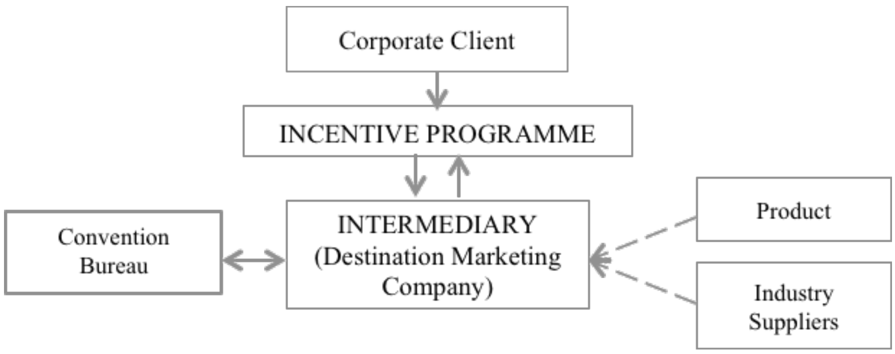


The diagram above illustrates how the value chain interfaces from supply level to the final hosting of the event. Roles and responsibilities of each link in the value chain are briefly described below.

- The Initiator / Client will either request a meeting or can be canvassed to hold their MICE event at a destination. Generally Association meetings that are compatible with a destination are bid for; the Association Board will appoint an international and/or local organising committee to oversee the meeting
- A conference bid is generated by either the Client or a Meeting Planner appointed by the Client; they are responsible for the decision regarding the host destination, the conference programme content and will keep control of the budget
- Convention Bureaus are responsible for marketing the destination to the MICE sector, for bidding support and for facilitating public and private sector collaboration
- Professional Conference and/or Event Organisers (Intermediaries) act as facilitators of MICE events; they are usually supported by a Local Organising Committee representing the Client; they interface and engage with product and industry suppliers
- The Product is the nucleus around which the MICE event is staged; products interact with both intermediaries and industry suppliers
- Industry Suppliers comprise all support services (entertainment, AV equipment, transport, tour operators for pre and post tours etc.); suppliers interact with product and intermediaries in delivering the conference successfully
- Pre and post tours are significant economic generators linked to a MICE Event that contribute to national GDP via growth to length-of-stay and geographical spread strategies

Intermediaries, Product and Industry Suppliers are the key economic generating drivers within the MICE value chain i.e. the private sector.

The incentive market follows somewhat different rules; it is strongly linked to the leisure tourism value chain whereby high-end incentive travel packages/itineraries rely on destination attractions and leisure products and facilities. The primary motivator of the destination choice is that it will provide an amazing experience.



The above diagram illustrates how the Incentive value chain interfaces from supply level to the final hosting of the event. Roles and responsibilities of each link in the value chain are briefly described below.

- A bid is generated by a Corporate Client; they are responsible for the decision regarding the incentive programme content and will keep control of the budget
- Intermediaries (Destination Marketing Companies in this instance) act as facilitators of incentive events; they research destinations, prepare the incentive programme itinerary and interface with product and industry suppliers

- The Product is the nucleus around which the incentive event is staged (either a resort-type product or an attraction supported by high-end lodge accommodation); products interact with intermediaries and industry suppliers
- Industry Suppliers comprise all support services (entertainment, AV equipment, transport, tour operators etc.); suppliers interact with product and intermediaries in delivering the incentive programme successfully

Potential MICE Source Markets

In 2013 international arrivals to Ethiopia totaled 681,249 with business and conference arrivals accounting for almost 28%.

The top source markets for MICE in Ethiopia (2009 – 2012) according to UNWTO and MoCT were the USA (16.7%) and UK, Germany, Italy and France (17.6%). African countries were not in the top generating source markets for conference tourism to the destination.

The top 10 source markets projected by World Travel and Tourism Council (WTTC) for business travel globally by 2020 are:

Rank by 2020	Country	US$ Billion
1	United States	310.1
2	China	233.1
3	Japan	101.4
4	United Kingdom	77.9
5	Germany	74.9
6	France	54.1
7	Italy	47.8
8	Spain	32.5
9	Russian Federation	31.1
10	Brazil	28.8

Going forwards a feasibility study would be required to identify important industry sectors of key relevance to the destination. This would determine pertinent potential MICE source markets for Ethiopia.

Addis Ababa is an important international diplomatic center; it is host to the headquarters of the African Union (AU) and the United Nations Economic Commission for Africa (UNECA). These organisations, along with the many Non-Governmental Organisations (associations / global aid agencies / development bodies) within the destination, are potential magnets of MICE business. Associations within specific and compatible professional and industry fields can be leveraged as target markets, as can the University of Addis via professors of faculties that may be linked to an association.

Regionally, the number of meetings and conventions within East Africa are growing rapidly; an important source market for Ethiopia to harvest. This market is easier to solicit as there is greater buyer awareness, it is easily accessible and delegates are familiar with the destination.

It is suggested that the international market be targeted through a phased approach depending on infrastructure development, capacity building and appropriate marketing. This niche is highly competitive, as buyers tend to look for the tried and tested!

The Incentive Travel market is probably the lowest hanging fruit of the MICE sector to target in the short-term. Ethiopia is 'undiscovered' and has outstanding unique natural, archaeological, historical and cultural attractions that could be marketed to this niche.

MICE Product Infrastructure and Development

Air Access	The International Bole Airport has become an increasingly important air hub in Africa with Ethiopian Airways one of the most respectable airline brands on the continent. Airlift and ease of access is a significant contributor towards delivering MICE success and in Ethiopia's case a competitive advantage regionally.
Venues	Current and planned MICE facilities offer a major opportunity and should be duly supported. For example the state-of-the-art United Nations (Economic Commission for Africa) Conference Centre, African Union HQ and Conference Centre, private conference facilities in hotels and the planned Addis-Africa International Convention and Exhibition Centre (AAICEC) provide a good range of venues for meetings and conferences.
Accommodation	The sector demands high quality accommodation particularly 4 and 5 star hotels – this component is currently catered for in Addis Ababa with approximately 1,312 five-star hotel rooms and 1,242 four-star hotel rooms (as per 2012 hotel list) including top international brand representation such as Hilton, Sheraton and Radisson Blu. As the sector accelerates into the future – this product niche would provide an important opportunity for inward investment, particularly in the high-end lodge arena to be geared for incentive tour groups.
Attractions	Ethiopia offers great potential for the packaging of pre and post conference tours as well as incentive itineraries to take to market.
Product development	The sector will require a dedicated destination-marketing organisation in the form of a Convention Bureau. For Ethiopia to succeed in attracting business tourism collaboration with the private sector will be crucial, and capacity building of intermediaries such as Professional Conference and Event Organisers is key. It will also be important to identify and formalise industry suppliers such as transport providers, AV equipment suppliers, catering, entertainment and security services. An international meeting buyer will expect a full range of competent services when deciding on a host destination.

MICE Marketing

MICE marketing calls for a different approach and a dedicated strategy; this segment has a client base and distribution channels that are very different to those of the leisure market. To position Ethiopia as a contender for MICE business a phased approach is recommended.

Institutional Development	In the immediate short-term a dedicated business tourism desk at the ETO can be initiated with the objective of working towards the establishment of a more professionally driven international best-practice Convention Bureau. To start with the desk can facilitate the commissioning of a feasibility study and an audit of the destination to determine a future structure for MICE marketing. At the same time the desk can focus on the development of the pre- and post

	conference travel market and assist with a formalised marketing campaign in order to support efforts currently spearheaded by the UNECA conference centre. Key performance areas for the convention desk in years 1 and 2 are: • Concretise membership of SITE[38] Africa • Engage with industry stakeholders to identify suitable operators to handle incentive trips • Develop incentive itineraries • Develop a marketing strategy for incentive sales • Attend trade shows to promote incentive travel to Ethiopia • Arrange familiarisation trips to potential incentive buyers The Convention Bureau, once established, will develop a stand-alone strategic MICE business plan for Ethiopia.
Marketing / Promotion	A business tourism brand for Ethiopia will be required once the destination brand strategy is concretised, and this followed with the development of a comprehensive sales and marketing strategy.

The following phased approach is recommended:

Phase 1: Years 1 and 2	• Feasibility study and destination audit of suitable product inventory • MICE brand / logo origination • Communication development (website, printed collateral, PR) • Packaging of re and post tour itineraries to take to market • Attendance at trade shows for promotion of conference and incentive opportunities e.g. Meetings Africa, Johannesburg – annually in February IMEX[39], Frankfurt – annually in May IBTM[40] World, Barcelona – annually in November
Phase 2: Years 3 to 5	• Focused effort on consolidation of a coordinated MICE industry sector • Professional development via mentoring and/or training of human capital • Concretise a bidding strategy along with bid book and supporting collateral • Develop MICE promotion management tools (e.g. measuring the positive return-on-investment of hosting a meeting) • Product packaging for meetings, conferences and exhibitions • Develop an event strategy for the destination • Develop a database strategy • Attend trade shows • Host site inspection / familiarisation trips for qualified meeting buyers

It should be noted that international best practice advocates that a new convention center (such as the planned AAICEC) should be taken to market a minimum of two to three years prior to opening.

To succeed in the MICE sector the industry must work in a coordinated way and the destination must become visible and connected.

[38] Society for Incentive Travel Excellence
[39] IMEX – The worldwide exhibition for incentive travel, meetings and events
[40] IBTM World – International business tourism market

Addendum E: Birding and Trekking Special Interest Segment Profiles

A. Birding

Market segment

Increasingly birdwatchers, or avitourists as they are sometimes referred to, travel to long-haul destinations to spot new bird species they cannot see in their own region. These birder types are categorised as follows[41]:

- **Casual birders**, who enjoy birds in the garden or during leisure activities
- **Active birders**, who attend bird courses and go on trips primarily to watch birds
- **Committed birders**, who spend most of their spare time birding.

Avitourists are described as educated, wealthy and conservation supporting. These tourists also have a high potential to contribute to local communities, educate locals about the value of biodiversity and create local and national incentives for the preservation of natural areas.

Product requirements

Important product requirements for birders that Ethiopian Tourism Organization needs to take into account include safety, quality, availability and variety of birdlife, birding accessibility and infrastructure, and knowledgeable English-speaking guides who advise them on the potential location and physical attributes of a particular species as this increases the chances of seeing less common.[42]

Birders have rated the following as their top considerations for selecting one avitourism destination over another:

- Accessible walking trails
- Information about birds and lists
- Time in bird hides
- Time on boardwalks to enjoy views
- Extended tours to visit other places

In their pursuit of observing, identifying and studying birds in their natural habitat, avitourists travel to locations that are often overlooked by other tourists[43]

Travel Behaviour

Birders are frequent travellers, travelling on average three times a year and over 17 days for birding[44].

Birders tend to prefer an independent travel programme as opposed to an organised birding tour and generally travel either as a couple or part of a group[45].

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[41] Conradie, N (2010) International market potential of avitourism in South Africa http://bit.ly/1UfJuYF
[42] CBI (2013) Product Fact Sheet Birdwatching tourism by EU residents http://bit.ly/1GR9Ebg
[43] South African Department of Trade and Industry (2010) Avitourism in South Africa http://bit.ly/1gfLbpw
[44] CBI (Date Unknown) Product Fact Sheet Birdwatching tourism by EU residents http://bit.ly/1GR9Ebg
[45] Ibid.

Avitourists and their travel companions may be interested in activities other than birding, especially nature-based activities. Marketing additional non-birding attractions to avitourists may therefore increase their length of stay in a destination[46]. As such there exists an opportunity for Ethiopia to cross-sell avitourism activities with other tourist activities.

Marketing to birders

Avitourists are likely to be members of local bird or nature organisations, and use birding books and magazines, birding organisations and recommendations from other birdwatchers when deciding where to go.

Birdwatchers are a small community and many people run in to each other during birdwatching, either at home, on a birdwatching event or during a holiday.

Birders generally have access to Internet and e-mail facilities and are comfortable with planning their trip on the Internet[47].

International avitourists have a high degree of preference for specialist birding tour operators and are less inclined to use travel agencies and general tour operators to organise their trips[48].

Birding Shows and Fairs

Dutch Bird Fair: Held annually, this trade fair includes a travel section with specialist birding tour operators exhibiting. www.dutchbirdfair.nl

Birdfair: Europe's largest annual bird watching fair, held annually in August, in Rutland. http://www.birdfair.org.uk

American Birding Expo: Hosted in the United States in October and defined as a retail show with birding products as well as specialist birding operators. http://www.americanbirdingexpo.com/

Online forums, associations and publications

Surfbirds: Offers listings of international tour operators specialising in birding in international destinations. http://www.surfbirds.com

Bird Forum: touted as the Internet's largest birding community and forum http://www.birdforum.net/

Vogelaar begint hier: An online forum in The Netherlands for bird watching. http://vogelaar.beginthier.nl/

Birding: A birding community in the UK. http://www.birding.uk.com

Birdwatch: A monthly magazine for birdwatchers. http://www.birdwatch.co.uk

The Association of Independent Tour Operators (AITO): Offers a listing of tour operators specialising in birding. http://www.aito.co.uk

[46] SA Department of Trade and Industry (2010) Avitourism in South Africa http://bit.ly/1gfLbpw
[47] Ibid.
[48] Ibid.

Bird Watching Magazine: Claiming to be Britain's best-selling bird magazine. http://www.birdwatching.co.uk/

Birding Magazine: Distributed by the American Birding Association. http://www.aba.org/birding/

BirdWatching: North America's premier magazine about wild birds and birding. http://www.birdwatchingdaily.com/the-magazine/

Birding Associations and Clubs

African Birdclub: A British-based club for birders with a common interest in African bird species. http://www.africanbirdclub.org

American Birding Association: Represents the North American birding community. http://aba.org/

Tour Operators

Inezia Tours: Based in the Netherlands and offering a variety of nature-based and birding packages http://www.ineziatours.nl/

Bird holidays Limited: UK based tour operator specialising in birdwatching holidays, birding tours, wildlife safaris and wildlife cruises. http://www.birdholidays.co.uk/

Birdfinders: Worldwide birdwatching holidays to the best birding destinations on every continent. **www.birdfinders.co.uk**

Birding Africa: Recommended as one of the top 5 most recommended bird tour companies in the world. http://www.birdingafrica.com/

Birding Ecotours: Located in South Africa and specialising in worldwide birding tours, including tours to Ethiopia. www.birdingecotours.co.za

BirdingBreaks: Dutch travel agent specialising in birding breaks internationally. www.BirdingBreaks.nl

Birdquest Tours: Easy-going bird and wildlife adventures. http://www.birdquest-tours.com/

Avian Adventures: One of the leading UK-based bird watching tour companies.

Eagle Eye Tours: US-based offering high quality tours to worldwide destinations www.eagle-eye.com

Sunrise Birding: US-based small group bird watching tours and wildlife safaris worldwide. www.sunrisebirding.com

Wings: US-based offering birding tours worldwide. http://wingsbirds.com/

Greentours: Provides Wildlife, Alpine Flower, Mammal Tours, Bird Watching and much more throughout UK, Europe, Africa, Americas, Asia, Australia. http://www.greentours.co.uk/

Ornitholidays: touted as the first birdwatching tour company in the world. www.ornitholidays.co.uk

Rainbow Tours: Pioneers of responsible travel, Rainbow Tours specialise in tailor-made holidays and small group tours to Africa, Madagascar and Latin America. www.rainbowtours.co.uk/

Rockjumper Birding Tours: One of the world's longest established and most highly regarded birding tour companies. www.rockjumperbirding.com/

B. Trekking

Market Segment

The trekking market falls within the adventure tourism segment, a traveller profile that has grown an estimated 65% per year from 2009 to 2012[49]. Within the adventure tourism segment, trekking is designated a hard adventure tourism market[50].

Seven out of the 10 largest markets for adventure/trekking travel retail sales are Western European (UK, Switzerland, Germany, France, Italy, Austria and the Netherlands) [51].

Adventure travellers are generally younger than their non-adventure travel counterparts, and are well educated with at least 37% of adventure travellers having at least a four-year degree. Over 70% of adventure travellers have a valid passport and most travel either with a partner, family or in a group.

Travel behaviour

Highly educated and prolific consumers of traditional and new media, adventure travellers spend over six hours a day reading social media, blogs and online sites.

Their key motivations for travelling include exploring new places and discovering exciting new activities[52] and although they are more likely to use the professional service of guides, instructors, specialist tour operators or other services[53], they are also comfortable with sourcing their own information online.

Their destination choices are influenced predominantly by family and friends, review-websites and travel magazines, and travel with their partners and families[54].

Product requirements

Trekkers seek a physical and mental challenge (in different degrees), authentic experiences and they like to connect with local people. Sustainability and responsible tourism are important to them and they are looking for a once-in-a-lifetime experience[55].

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49 Adventure Travel Trade Association (2013) Adventure Tourism Market Study http://bit.ly/1xWbncD
50 CBI (2013) CBI Product Factsheet: Trekking tourism from the Europe to Asia http://bit.ly/1C9pRf8
51 Ibid.
52 Skift (2014) Profile of the Adventure Traveler: Smart and Not Afraid http://bit.ly/1zeXkmc

53 Ibid.
54 Skift (2014) Profile of the Adventure Traveler: Smart and Not Afraid http://bit.ly/1zeXkmc

55 Ibid.

Adventure travellers cite relaxation, exploring new places, time with family and learning about new cultures as key to their travel experiences.

Adventure travellers also rank areas of natural beauty as the most important factor in choosing their destination, followed by the activities available and the climate of the destination. Many trekkers expect and prefer an untouched natural environment for their trekking and are particularly interested in the sustainability of a destination and trekking programme.

Adventure travellers can be attracted to a destination with a well-protected environment and a range of adventure activities, and are not tied to visiting a destination where they have friends or family[56].

Safety of treks and safety of the destination is of utmost importance. As treks are often done in lesser-developed and mountainous areas, trails can be easily damaged by natural disasters, flooding, warmth or drought[57].

A good English-speaking guide can make or break the experience. Trekking tourism providers can add value to their treks by having good guides that are able to tell interesting facts and stories about the trek they are doing[58].

Marketing to Trekkers

Adventure travellers are typically savvy tourists who spend time researching and planning their ideal experiences. They are more likely to prepare for a trip prior to leaving, relying on Internet research and consulting with friends and family, and recommending trips by posting on social media sites[59].

They also read special-interest publications such as National Geographic, National Geographic Traveller[60], Adventure Travel Magazine, Wanderlust and Adventure World Magazine, among others.

Research indicates that they are more likely than their non-adventure counterparts to use professional services especially if they are older and depending on their country of origin. Europeans and British travellers are more likely to use professional services than American travellers for instance. Their average trip spend is also relatively high[61].

The high proportion of adventure travellers doing online research emphasizes the importance of maintaining a strong web presence and online marketing strategy. Adventure travellers also use social media prolifically. This means they can be important promoters for destinations and activities, recommending travel to their friends and family through social media and posting reviews online.

Trade Shows

Adventure Travel Life: An adventure travel event for consumers held in January in London. http://www.adventureshow.co.uk

[56] Ibid.
[57] CBI (2013) CBI Product Factsheet: Trekking tourism from the Europe to Asia http://bit.ly/1HDudxo
[58] Ibid.
[59] Ibid.
[60] Adventure Travel Trade Association (2013) Adventure Tourism Market Study http://bit.ly/1xWbncD
[61] Ibid.

The Telegraph Outdoor Adventure & Travel Show: Another consumer adventure travel show held in London, but in February. http://telegraphoutdoorshow.co.uk

Travel & Adventure Show: Held in several cities across the United States from January to March. http://travelshows.com/

The Outdoor Adventure & Travel Show: Held in several cities across Canada from February to April. http://outdooradventureshow.ca

The Adventure Travel Expo: A consumer show held in both Melbourne and Sydney, Australia. http://bit.ly/1dDULAv

Adventure Travel World Summit: Organized by the Adventure Travel Trade Association for adventure tourism stakeholders including tour operators. http://bit.ly/1wFgXSc

Fiets en Wandelbeurs: A cycling and walking trade fair held every February in Amsterdam. http://www.fietsenwandelbeurs.nl

Tour Natur: A walking and trekking trade fair held in September in Dusseldorf. http://www.tournatur.com

Pure Life Experiences: A new show focusing on the 'evolved' traveller seeking experiences. http://www.purelifeexperiences.com

Adventure Sports Fair: largest adventure sports event in Latin America, held in Brazil in September. http://www.adventurefair.com.br/english/

Online Forums, Associations and Publications

Adventure Travel Trade Association (ATTA): A global trade organisation for the adventure travel industry with a full list of specialist adventure travel tour operators. http://bit.ly/1HDvogn

Ladies Trekking Club: A club that unites active and adventurous women from all over the world. http://www.ladiestrekking.com/

London Adventure Group: London-based group that organises adventure travel trips in the UK and overseas for its members http://londonadventuregroup.org/

Adventure Collection: A partnership of the world's best adventure travel companies. www.adventurecollection.com

Travel Africa Magazine: Only international magazine dedicated to exploring Africa and travel to Africa. http://travelafricamag.com/

Adventure World Magazine: Covers a range of adventure sports including trail running, trekking and general adventure travel. http://www.adventureworldmagazine.com/

Wanderlust Magazine: Wanderlust is a British travel magazine, covering adventurous, cultural and special-interest travel. www.wanderlust.co.uk/

Active Traveller: Guide to activity and adventure holidays in the UK and abroad. http://active-traveller.com/

Backpacker Magazine: Source for backpacking gear reviews, outdoor skills information and advice, and destinations. http://www.backpacker.com

365 Adventure.com: Online adventure tourism and travel forum http://www.365adventure.com/forum/

BootsnAll: Independent travel experts forum with adventure travel section http://boards.bootsnall.com/adventure-travel-f26.html

German Alpine Club: the world's largest climbing association and the eighth largest sports union in Germany. The Club is the responsible body for sport and competition climbing, hiking, mountaineering, hill walking, ice climbing, mountain expeditions as well as ski mountaineering. http://www.alpenverein.de

Other alpine hinking clubs:

- Austria: Österreichischer Alpenverein (ÖAV)
- France: Club Alpin Francais (CAF)
- Italy: Club Alpino Italiano (CAI)
- Switzerland: Schweizer Alpen-Club / Club Alpin Suisse (SAC)

Others of interest: http://www.hikingandbackpacking.com/organizations.html

Tour Operators

Intrepid Group: World's largest provider of adventure travel experiences. http://www.intrepidgroup.travel

Footprint Adventures: Adventure holidays in Asia, Africa, and South America. www.footprint-adventures.co.uk/

360 Expeditions: Adventure travel, holidays, extreme expeditions and charity challenges. http://www.360-expeditions.com/

Exodus: The original activity and adventure holiday company**.** http://www.exodus.co.uk/

Explore: Small group adventure holidays including walking and trekking tours https://www.explore.co.uk/

KE Adventure Travel: Boats a strong collection of worldwide trekking holidays.
http://www.keadventure.com/

Macs Adventure: Specialise in walking holidays, cycling holidays, and tailor made adventures in the UK, Europe, and around the world.
http://www.macsadventure.com/

Travel The Unknown: Promising worldwide active tours, including trekking. http://www.traveltheunknown.com/

Walks Worldwide: Independent specialist for trekking and walking holidays.

http://www.walksworldwide.com/home.html

Boundless Journeys: Touted as one of the "Best Adventure Travel Companies on Earth offering hiking and trekking. http://www.boundlessjourneys.com

Adventures Within Reach: Adventure travel trips with activity, culture, and nature, which are customizable, flexible, and affordable.
http://www.adventureswithinreach.com/

World Expedition: International tour operator specializing in small group trekking and adventure travel holidays and vacations since 1975. http://www.worldexpeditions.com/

Rei Adventures: Active vacations, weekend getaways, family adventures, and volunteer expeditions for all levels of experience.
http://www.rei.com/adventures/

Addendum F: Ethiopian Airlines Destinations and Flight Times

Destination	Flight time	Destination	Flight time
Africa		**Europe & America**	
Abidjan	8h 05m	Brussels	9h 10m
Abuja	5h 25m	Dublin	33h 30m
Accra	5h 40m	Frankfurt	6h 40m
Bamako	6h 45m	London	7h 20m
Bangui	25h 40m	Los Angeles	20h 30m
Berbera	No info	Madrid	11h 00m
Blantyre	4h 20m	Milan	8h 25m
Brazzaville	4h 20m	Paris	6h 55m
Bujumbura	4h 00m	Rome	6h 00m
Cairo	3h 55m	Rio de Janeiro	29h 24m
Cape Town	9h 10m	São Paulo	44h 35m
Conakry	10h 35m	Stockholm	9h 50m
Cotonou	25h 50m	Toronto	18h 30m
Dakar	9h 50m	Vienna	6h 30m
Dar es Salaam	2h 35m	Washington	13h 15m
Djibouti	2h 25m		
Douala	6h 15m	**Gulf, Middle East & Asia**	
Entebbe	4h 20m	Bahrain	22h 50m
Enugu	4h 55m	Bangkok	9h 00m
Freetown	25h 35m	Beijing	11h 10m
Harare	4h 05m	Beirut	4h 40m
Hargeisa	1h 40m	Dubai	4h 15m
Jimma	0h 50m	Delhi	6h 40m
Johannesburg	5h 30m	Dammam	9h 00m
Juba	8h 10m	Doha	9h 45m
Kano	4h 30m	Guangzhou	31h 25m
Khartoum	1h 55m	Hangzhou	15h 20m
Kigali	2h 35m	Hong Kong	11h 00m
Kilimanjaro	2h 15m	Jeddah	2h 55m
Kinshasa	5h 45m	Kuala Lumpur	16h 20m
Lagos	5h 35m	Kuwait	04h 10m
Libreville	4h 35m	Manila	13h 30m
Lilongwe	6h 10m	Mumbai	4h 55m
Lome	5h 45m	Muscat	4h 20m
Luanda	11h 35m	Narita	28h 20m
Lubumbashi	5h 30m	Riyadh	3h 25m
Lusaka	6h 05m	Sana'a	1h 45m
Malabo	4h 45m	Seoul	15h 45m
Malakal	No info	Shangai	11h 30m
Maputo	5h 30m	Singapore	16h 55m
Mombasa	2h 25m	Tel Aviv	4h 40m
Monrovia	28h 00m		
N'Djamena	3h 45m	**Domestic**	
Nairobi	2h 00m	Aksum	1h 30m
Ndola	4h 00m	Bahir Dar	1h 00m
Niamey	5h 30m	Dire Dawa	1h 00m
Ouagadougou	7h 30m	Gambela	1h 15m
Pointe-Noire	5h 00m	Gondar	1h 05m
Seychelles	16h10m	Lalibela	1h 00m
Zanzibar	4h 05m	Mekele	1h 15m

Addendum G: Broad Categorisation of VICs

The following is a broad categorisation of the types of Visitor Information Centres as part of the Ethiopia i-Network:

Category A: Gateway Visitor Information Centres.
Category B: Regional Visitor Information Centres or Hub VICs.
Category C: Local Visitor Information Centre

Category A: Gateway Visitor Information Centres

These are VICS that are of strategic importance to the overall mission and goals of the ETO, namely increased length of stay, spend and geographical spread. Ideally, ETO would operate these VICs themselves or if not possible, outsource this service to the private sector by way of a tender process and a set of criteria and requirements.

These centres include *VICS at the most prominent locations and concentration points for international visitors*, both leisure and business – e.g. Bole International Airport (operated by ETO in partnership with Ethiopian Airlines and the Airport Authority) and key locations such as Meskel Square.

These are substantial, professional, sales orientated Centres, offering full itinerary planning and booking services for travel not only in Addis Ababa, but also throughout Ethiopia.

The criteria for defining Gateway Centre locations include:

- *Current and potential market demand* with a real need for information and booking services. This may be ascertained from analysis of available data and, if necessary, new surveys.
- Availability of a *suitable, highly accessible site.*
- Opportunities for *substantial partnership* involvement.
- Potential for *sales* of accommodation, other tourism products, travel goods and souvenirs.

These centres are open seven days per week over extended hours, appropriate to the location. The role of these centres will be to support the marketing strategy generally and, more specifically, to provide:

- Information
- Itinerary planning
- Accommodation and tour bookings
- Bookings for national parks and other leisure facilities

Significant capital and operational funding from public resources will be required initially to establish and operate these centres. The potential to generate significant levels of commercial income or partnership funding should be pursued vigorously, with the aim of achieving a level of 30% self generated funding over a three to five year period.

The opportunity for additional activities will vary according to the location in question. For example, at Bole International airport, space and retail opportunities are limited, constraining the potential for display of literature and the scope for income generation.

Category B: Regional Visitor Information Centres

VICs that are located at major strategic locations and visitor convergence points in the regions e.g. Aksum, Lalibela, Mekele (for Afar), Bishoftu, Arbaminch etc.

The focus for visitor services delivery around the region should be regional tourism 'hub VICs' that:

- Offer a full range of high quality counter services (as for Gateway Centres) and are regarded as the main VIC within their area.
- Are open seven days per week over hours appropriate to customer demand
- Are responsible for visitor services generally within their areas – including overseeing the standards and operations of local VICs and information points, print distribution, etc.
- Provide interpretation regarding their area as a tourism destination – displays, AV shows, exhibitions, etc.
- Make full use of IT in their operations.
- Share skills and knowledge amongst their local VICs.
- Undertake 'back office' visitor services functions, including industry liaison (and maintaining the regional product database for their areas

The criteria for location of these centres should be subject to research to determine optimum location, in terms of potential visitor numbers, commercial potential and centrality within a logical geographical area, but also taking account of the suitability (or otherwise) of existing premises.

Because of their pivotal role within their areas, in terms of both front and back office activities, these Hubs will require significant public funding.

Category C: Local Visitor Information Centres

VICs at key local attractions and important local convergence points, including:

- VICs at local town and visitor points centres such as Bahir Dar, Tis-Abay, Gondar, Debark (Simien Mountains), Wukuro, Hawzien, Dire Dawa, Adama, Bale Mountains, Dodola, Asela, Hawassa, Jinka, Konso, Dilla, etc.
- Temporary VICs used for events such as religious and cultural festivals, sport events, etc.
- Visitor information distribution at MICE facilities and City attractions, such as EC Convention Centre, AU Convention Centre, Entoto complex, the National Museum, etc.

These VICs will be of varying types, size and a range of locations. These are visitor points that would not deal with high volumes of tourists and which would deal primarily with local enquiries by both visitors and residents. Content would include literature displays, location and reference maps, and perhaps touch screen kiosk access to the official website.

These points could either be staffed or without staffing. An attractive information point module should be designed, to incorporate literature and map displays and where possible a computer screen to access the official ETO Web site. These modules would be situated in areas where there is a need for information provision, but a staffed centre is not viable. The precise locations must be secure and well managed.

Currently VICs in Ethiopia are not regulated or supported by ETO. This is not ideal as the quality of service varies greatly from region to region and VIC to VIC. In addition, the branding and look and feel of VICs in the country differ, confusing visitors.

The strategy proposes that ETO should formally accredit VICs. VICs would be accredited according to service standards and this accreditation would take place every two to three years, depending on the category of VIC.

The accreditation of VICs is designed to provide the visitor with a consistent and recognised level of information and customer service throughout the region. All VICs will be required to be accredited by ETO and the organisation will need to manage the accreditation programme.

Extensive marketing and promotion of the Ethiopia i-Network brand will ensure that visitors to Ethiopia recognise accredited VICs and the value they represent. VICs with accreditation will have a competitive advantage over non-accredited VICs.

Visitor Information Centres that achieve accreditation will be:

- Recognised as part of the official network of Ethiopia Visitor Information Centres (i-Network) with publicity and marketing that goes with it
- Included in the ETO generic and cooperative marketing brochures
- Eligible to use the well promoted, unique " i" sign symbol
- Included in the ETO website
- Included in the general promotion of the VIC network to the visitor and the tourism industry
- Able to use the ETO brand (within the regional brand family) and branded materials (uniforms, signs, etc.)
- Able to sell branded merchandise
- Able to use the Ethiopia database system, including VIC interface and knowledge exchange
- Access to information training (skills, product knowledge, etc.)

ETO representatives will conduct inspections and evaluations of VICs to ensure minimum standards are met and maintained. The following table provides a summary of criteria for various levels of VICs and the level of excellence that the VIC needs to attain.

VIC CATEGORY/ CRITERIA	Gateway Visitor Information Centres	Regional Visitor Information Centres (Hubs)	Local Visitor Information Centres/Mobile VICs
Full range of information services across Ethiopia	✓		
Limited range of information available		✓	✓
Reservation services	✓	✓	
Open Seven Days a Week	✓		
Open 5 days a week or more		✓	✓
Full use of IT in operations	✓		
Limited use of IT in operations		✓	✓
Share skills and knowledge amongst local VICs	✓	✓	
Training of staff	✓	✓	
Provide interpretation regarding their area as a tourism destination	✓	✓	✓
Undertake 'back office' visitor services functions, including industry liaison and maintaining the ETO product database for their areas	✓	✓	

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Acronyms and abbreviations

AAICEC	Addis Ababa International Convention and Exhibition Centre
AU	African Union
BRIC	Brazil, Russia, India, China
CEO	Chief Executive Officer
CRM	Customer Relationship Management
DMO	Destination Marketing Organisation
ESTDP	Ethiopia Sustainable Tourism Development Programme
ETO	Ethiopian Tourism Organisation
EU	European Union
ICCA	International Congress and Convention Association
ICT	Information Communication Technologies
KPA	Key Performance Area
KPI	Key Performance Indicator
MBR	Market-based Representative
MICE	Meetings, Incentives, Conventions, and Exhibitions
MoCT	Ministry of Culture and Tourism
ROI	Return on Investment
SEO	Search Engine Optimisation
SITE	Society for Incentive Travel Excellence
TGF	Tourism Growth Fund
UGC	User Generated Content
UNECA	United Nations Economic Commission for Africa
UNESCO	United Nations Educational, Scientific and Cultural Organisation
UNWTO	United Nations World Tourism Organisation
VFR	Visiting Friends and Relatives
VIC	Visitor Information Centre

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