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ATHENS INSTITUTE FOR EDUCATION AND RESEARCH

A World Association of Academics and Researchers

8 Valaoritou Str., Kolonaki, 10671 Athens, Greece.

Tel.: 210-36.34.210 Fax: 210-36.34.209

Email: info@atiner.gr URL: www.atiner.gr

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Athens Journal of Tourism

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The current issue is the third of the seventh volume of the *Athens Journal of Tourism*, published by the [Tourism, Leisure & Recreation Unit](#) of ATINER.

Gregory T. Papanikos
President
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14th Annual International Conference on Mediterranean Studies, 29-31 March & 1 April 2021, Athens, Greece

The [Center for European & Mediterranean Affairs](#) organizes the 14th Annual International Conference on Mediterranean Studies, 29-31 March & 1 April 2021, Athens, Greece sponsored by the [Athens Journal of Mediterranean Studies](#). The aim of the conference is to bring together academics and researchers from all areas of Mediterranean Studies, such as history, arts, archaeology, philosophy, culture, sociology, politics, international relations, economics, business, sports, environment and ecology, etc. You may participate as stream leader, presenter of one paper, chair a session or observer. Please submit a proposal using the form available (<https://www.atiner.gr/2021/FORM-MDT.doc>).

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- Abstract Submission: **31 August 2020**
- Acceptance of Abstract: 4 Weeks after Submission
- Submission of Paper: **1 March 2021**

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- Social Dinner
- Mycenae Visit
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- Delphi Visit
- Ancient Corinth and Cape Sounion



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17th Annual International Conference on Tourism 7-10 June 2021, Athens, Greece

The [Tourism, Leisure & Recreation Unit](#) of ATINER organizes its **17th Annual International Conference on Tourism, 7-10 June 2021, Athens, Greece** sponsored by the [Athens Journal of Tourism](#). The aim of the conference is to bring together academics and researchers from all areas of Tourism. You may participate as stream leader, presenter of one paper, chair a session or observer. Please submit a proposal using the form available (<https://www.atiner.gr/2021/FORM-TOU.doc>).

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Spa Tourism in Europe: An Economic Approach

By Georgia Papadopoulou*

Spa tourism is a fast-growing sector of wellness tourism that is contributing to the wellness tourism economy. Europe is a leading player in wellness tourism while spa tourism's fame is increasing day by day. The current research focuses on the evaluation of spa tourism in the European countries and determine the extent to which it has succeeded. The study explores the extant literature on spa tourism in existence to demystify certain aspects associated with it, identifies successes and gaps that exist in spa tourism in Europe and seeks to offer an empirical analysis of facts and figures on spa tourism in Europe. The study recognizes the need to understand the nature of spa tourism in Europe from an economic perspective.

Keywords: *Spa, Spa Tourism, Wellness Tourism, Europe, Trends, Economy.*

Introduction

Spa tourism or business takes the center stage of a relatively broader concept of wellness tourism. Spa tourism is a significant component of wellness tourism that is credited for immensely contributing to the wellness tourism economy (Kazandzhieva, 2014). Europe is reported to be a leading player in wellness tourism, so is spa tourism which is of particular importance with regards to the tourism product whose complexity is increasing day-by-day (Kazandzhieva, 2014). Spa tourism is arguably a fast-growing sector in the tourism economy which is currently characterized by increased interest in both traditional remedial therapies, as well as, new age remedies (Okech, 2014). However, the success of spa tourism is something that needs to be demystified using tangible empirical evidence owing to the limited literature on that subject area. This research study seeks to evaluate spa tourism in Europe and to determine the extent to which it has succeeded, using facts and figures collected from Europe's tourism industry.

The research questions of the study are:

1. What is the nature of spa tourism in Europe?
2. What to extend has spa tourism succeeded as part of wellness tourism in Europe?

The research hypothesis is:

H₀: Spa tourism has not significantly succeeded in Europe.

H₁: Spa tourism has significantly succeeded in Europe.

*Assistant Professor, Al Ghurair University, Dubai, United Arab Emirates.

A research study on spa tourism in Europe will be a critical move in meeting several ends. First, the study will explore the extant literature on spa tourism in existence to demystify certain aspects associated with it, such as the evolution of spa tourism, the distinction between spa tourism and other kinds of tourism, and the main products and services offered under spa tourism among others. Second, it will identify successes and gaps that exist in spa tourism in Europe with a view of establishing whether or not spa tourism has succeeded in the European tourism industry. Lastly, the study seeks to offer an empirical analysis of facts and figure on spa tourism in Europe thus enriching the empirical evidence in existence regarding spa tourism in Europe.

This research study makes use of a mixed-methods approach since it will encompass an analysis of both quantitative and qualitative data on spa tourism in Europe. Data for this study has been collected from secondary sources which include books, journal articles, websites, online articles, government publications, and periodicals. The research study will make use of the methodology component of the research paradigm to explore spa tourism in Europe.

This paper is structured as follows: The relevant literature review follows including the concept of spa tourism, the spa services and spa types and the spa tourism in Europe. Later, there is a discussion on the empirical literature which concludes statistics on spa tourism globally and in Europe. The methodology of the paper follows, discussing about the research methods, the data collection methods, the research paradigm and research philosophy. After the methodology section, the data analysis and research findings are presented, and the final section concludes.

Literature Review

This section aims at exploring the literature in existence regarding spa tourism. It will analyze what past researchers have concluded about the existence of spa tourism and its successes with emphasis on spa tourism in Europe. The section will help the researcher to distill the major key findings and themes on spa tourism to identify gaps in empirical evidence that need to be addressed in evaluating whether spa tourism in Europe is a success.

The Concept of Spa Tourism

Spa tourism is not a new concept when it comes to the connection between tourism and health. It is argued that people began traveling to or visiting spa towns in the 1800s, a practice that has gained significant traction across the world (Okech, 2014). Currently, spa services are not only demanded by international tourists but also local tourists (Hashemi et al., 2015). Depending on the purpose and treatment options available, spa services form part of health tourism and they are ranked between medical and wellness (Hashemi et al., 2015). Attending spa has been one of the activities undertaken by active and health-conscious people (Hashemi et al., 2015). Spa tourism exists in the ambit of wellness tourism which

refers to a certain type of tourism where people seek to promote and maintain their health by putting a lot of emphasis on the holistic wellness of their physical body, mind, and soul in course of their traveling adventures (Lin, 2013). Therefore, spa tourism is one type of wellness tourism which is under health tourism.

The origin of the term spa is associated with various locations and words. First, the term spa is derived from a Latin acronym *Sanitas per aqua* which means 'health through water' (Okech, 2014; Hashemi et al., 2015; Yurcu, 2017). Specifically, the spa is cited to origin from a Latin word 'spagere' which means to scatter, sprinkle, or moisten or may be the acronym of 'sanus per aquam' as earlier indicated (Kazandzhieva, 2014; Yurcu, 2017). Second, in other studies, the word spa is said to be derived from a Walloon word 'espa' which means a fountain (Kazandzhieva, 2014; Yurcu, 2017). This term, in turn, is traced to the name of a Belgian town Spa, a place where a curative thermal spring was discovered in the 14th century (Kazandzhieva, 2014). In general terms, a spa is defined as a collection both water-based and non-water facilities used to offer a wide array of health, medical, relaxation, and beauty treatments (Okech, 2014). The term spa still finds a lot of use in Britain whereas 'thermal water' is the term that is often used in the rest of Europe. As such, a spa is simply bathing in thermal water for therapeutic purposes, and it is a practice that can be referred to using a myriad of terms, such as spa therapy, hydrotherapy, and balneotherapy (Kazandzhieva, 2014). All these terms can be also used interchangeably.

Spa tourism is marked with a multitude of services. Some of the water-based spa therapies include hydrotherapy, thalassotherapy, balneotherapy, and cosmetic therapies. Under supportive and complimentary spa therapies we have massages, peloid therapy, climatotherapy, sound therapy, mud, color therapy, heliotherapy, and exercise (Yurcu, 2017). In wellness and spa therapies there is everything that makes people feel good. People experience spa tourism for the sole purpose of restoring their health in terms of its psychological, physiological, or sociological facets (Yurcu, 2017). Besides, spa tourism allows people to have fun and to rest out of their stressful daily or work routines (Yurcu, 2017). Consequently, the International Spa Association (ISPA) conceptualizes spas as places where professional services are provided to promote people's well-being through refreshing the body, mind, as well as, the spirit (Hyde-Smith, 2012).

Spa Services and Spa Types

Each of the services offered in spa tourism is tailored to meet specific demands or rather serve a specific purpose. For instance, thalassotherapy, climate, and sea are applied in curing style meaning they are made to cure (Yurcu, 2017). On the other hand, balneotherapy is therapeutic and it is applied via curing style through activities, such as bathing, drinking, and sometimes inhalation of natural treatment elements like gases, thermal mineral waters, and peloids among others (Yurcu, 2017). When it comes to hydrotherapy, the cure is usually done or performed using freshwater and with water whose temperature is 200C (Yurcu, 2017). Lastly, cosmetic therapies are also applied in the curing style that involves natural products or cosmetic preparations (Yurcu, 2017).

There are numerous types of spas in spa tourism as outlined by the International Spa Association (ISPA) in 2010. The first type is day spa which is known for offering spa services, such as facial and body treatment, but on what is called a day-use-only basis (Okech, 2014). The second one is a hotel spa or resort spa which mostly offers a spa, wellness and fitness services, spa cuisine menu choices, as well as overnight lodging within hotel or resort premises (Okech, 2014). The third is a destination spa whose basic purpose is to guide individual spa-goers to attain their ultimate or desired healthy lifestyles (Hashemi et al., 2015). Ideally, a destination spa is an extended program that incorporates things like spa services, wellness education, special interest programming, healthy cuisine, and physical fitness activities (Okech, 2014). The fourth one is mineral spring(s) which is a kind of spa that offers an onsite source of the thermal mineral, and seawater that is normally used in hydrotherapy treatments (Hashemi et al., 2015). The fifth one is a club spa which is a facility is known to offer spa services that are professionally administered by its attendants. The sixth one is cruise ship which is a spa that is aboard a cruise ship whose spa services are professionally administered (Hashemi et al., 2015). The seventh is a cosmetic spa which is credited for offering cosmetic/ aesthetic and wellness/prevention procedures and services, such as facials, waxing, peels, and other minor non-invasive procedure that do require on-site medical supervision (Okech, 2014). Last but not the least is a medical spa that is essentially run by licensed healthcare professionals who offer on-site, comprehensive medical and wellness care the incorporates spa services; besides, having a traditional, alternative, and/or complementary treatments and therapies (Okech, 2014). The medical is distinct in that it offers aesthetic/ cosmetic and preventive/wellness procedures and services based on the scope of practice of its staff (Hashemi et al., 2015). Therefore, spa tourism is a significant branch of tourism going by the types of spa present in the industry.

Spa Tourism in Europe

The concept of a spa is drawn from numerous countries. Europe is one of the regions where the significant influence of spas came from (Hyde-Smith, 2012). In the European spa sector, the element of water plays a pivotal role because of its relationship with “taking water” (Ellis, 2008). Initially, European spas have been linked with natural thermal spring of which people like the Romans and Greeks believed they had some healing powers (Hyde-Smith, 2012). Historically, Romans regarded spa as crucial social, political, and group affair (Hyde-Smith, 2012). The connection between water, healing, and spa has been identified in Europe and two types of spa emerge. These two categories are the thermal spas that comprise cold water springs for drinking and natural hot springs for purposes of healing and; thalassotherapy spas which make use of mineral bath salts, seawater, seaweed (Cohen & Bodecker, 2008). However, the modern spas which are currently used in the European spa industry are increasingly named after the geographical origins of the water used in the treatment or therapy. For instance, we have the Aix massage and Vichy massage (Hyde-Smith, 2012). Identification of these spas is important because some European destinations, such as Baden Baden in Germany and

Budapest in Hungary use spas as a source of tourist attraction which correlates European spa tourism success (Hyde-Smith, 2012).

Over time, European spas have undergone a monumental paradigm shift in the nineteenth century from their initial mission of health and healing to pampering and luxury (Hyde-Smith, 2012). As things changed more elements were added to the European's concept of SPA where people began to attend spa, not for healing but the pursuit of relaxation, beauty, health, inspiration and in the end for sexual pleasure (Ellis, 2008). In the meantime, spas increasingly became a preserve of the wealthy (Hyde-Smith, 2012). Some of the additions that were made to develop a European spa include seawater facilities, climatic resorts, and naturopathy (Hyde-Smith, 2012). Better spa made better revenue hence the success and growth of the European spa industry which this study seeks to explore.

Studies intimate that the growth trend of the European spa economy has not always been on an upward trajectory, but one that has cyclical changes. For instance, in the early phase of the twentieth century, many European spa resorts run into glaring disuse something that leads to a slump in the growth of the European spa sector (Ellis, 2008). The recent withdrawal of government funding informs of care schemes, many spas have been forced to adopt other business models like venturing in wellness tourism further aggravating the disuse problem thus negatively impacting spa tourism in Europe (Hyde-Smith, 2012). However, this trend has been reversed by high demand for spa services by the baby boomers' generations and their children or generation X, who constitute the heavy consumers of spa and spa-related services, especially in Europe (Hyde-Smith, 2012). It is on this conclusion the study's alternative hypothesis that 'Spa tourism has significantly succeeded in Europe' is premised.

Empirical Literature

In this section, the study seeks to look at statistics on spa tourism across the global industry before narrowing down to Europe to illustrate how spa tourism has been performing.

Globally spa economy has been doing well. Based on 2015 data, the spa tourism economy was estimated to be \$98.62 billion (Yurcu, 2017). A prior study done by the Stanford Research Institute in 2007 in 261 countries estimated the global spa industry at 254.8 billion dollars at that time (Okech, 2014). Out of this approximate figure \$ 60.5 billion represented core spa sales while the additional \$ 194.3 billion revenue raised by spa-related businesses like tourism, hospitality, and real estate (Tabacchi, 2010). Updated data and trends by the Global Wellness Institute (GWI) gives relatively better figures of the global spa industry. GWI states that there were over 149,000 spas worldwide which were earning approximately \$93.6 billion and employing they employed close to 2.5 million workers in 2017 (GWI, 2017). The same organization estimated that the global spa industry was growing at a rate of 9.9 % per annum from 2015-2017 (GWI, 2017). Furthermore, GWI projects that the global spa industry is going to hit \$128 billion

in the fiscal year 2022 (GWI, 2017). Table 1 below shows the top five markets in spa tourism by 2017.

Table 1. Average Revenue

Country	Average Revenue (in billions of US dollars)
1. United States	20.8
2. China	8.2
3. Germany	6.7
4. Japan	5.7
5. France	3.6

Source: GWI (2017)

The above statistics only show the global trend of the spa industry, and therefore, spa tourism in Europe needs to be explored further since it is her success this study is concerned with.

Turning on to Europe, tourism trends exist in Europe's tourism economy. Statistics reveal that Europe still enjoys the largest slice of international tourism. However, travel numbers that come outside her major feeder market locations have consistently been declining year-on-year basis (Csirmaz & Pető, 2015). For instance, in 2012, Europe has the highest number of international tourist arrivals at 56 % translating into 534.7 million tourists (Csirmaz & Pető, 2015). Similarly, in the same fiscal year, Europe recorded the largest share of revenues which stood at \$ 453.4 billion representing 42.1% of the total tourism revenues realized internationally (Csirmaz & Pető, 2015). These figures need to be dissociated further to capture spa tourism alone which is the main essence of this study.

Data from specific spa tourism destinations in Europe is well documented but limited. For instance, Hungary and Slovenia are two outstanding spa tourism destinations in Europe. In 2012 alone Slovenia spa resorts received 786,700 visitors where foreign tourists accounted for 43% of the turnover. In the case of Hungarian spas, 2,535,569 tourists were received, and of this 1,880,000 were foreign tourists. The conclusion is that Europe is a hotbed of spa tourism, but much is needed to gauge how the industry has been performing lately.

The literature review done shows that spa tourism has taken root in Europe where it enjoys a long history. Different types of spa services, spa types, and spa destinations exist in Europe; and thus, it is important to further explore the nature of spa tourism in Europe as the first research question owing to the complexity of the spa industry. Empirical literature review points to the conclusion that global spa tourism is thriving or succeeding well. However, the begging question remains of whether spa tourism in Europe is succeeding in the same way. Addressing this question will solve the research that exists in the extant literature explored where few studies exist on the success or otherwise of spa tourism in Europe. With this the answer, the researcher will be able to either accept or reject the null hypothesis (H₀) which states that; Spa tourism has not significantly succeeded in Europe.

Methodology

This brief section is specially made to analyze the research methods used to research the issue of the nature of spa tourism in Europe and its success.

Research Methods

This research study makes use of a mixed-methods approach since it will encompass an analysis of both quantitative and qualitative data on spa tourism in Europe. The mixed-methods approach is beneficial to this study because it allows the researcher to use methods of data collection or analysis that are reserved for either quantitative or qualitative research approach in a single study for better exploration of the phenomena under study (Williams, 2007).

Data and Data Collection Methods

Data for this research will be collected from secondary sources. These sources will include books, journal articles, websites, online articles, government publications, and periodicals among other sources. Data will be searched from the internet using search engines such as 'Google Search' and 'Google Scholar'. A simple inclusion-exclusive criterion will be used to maximize the number of sources and material available for analysis because literature and material on spa tourism are limited. The criterion is to use materials published from 2010 onwards to ensure the currency of trends in spa tourism. Collected data will be presented in prose form, tables, graphs, and charts among other forms.

Research Paradigm and Research Philosophy

The research study will make use of the methodology component of the research paradigm to explore spa tourism in Europe. The use of methodology is appropriate because it allows the combination of different techniques by researchers to explore different situations (Žukauskas, Vveinhardt & Andriukaitienė, 2018). The interpretivism research paradigm will be used because it can allow the use of qualitative or quantitative methods too, can use document study and case studies in a case where the researcher and the reality of the phenomenon under study are inseparable (Žukauskas, Vveinhardt & Andriukaitienė, 2018). Under interpretivism research, philosophy knowledge comes from abstract descriptions of meanings, which sometimes are formed of human experiences (Žukauskas, Vveinhardt & Andriukaitienė, 2018).

Data Analysis and Research Findings

In this study, the research will seek to interpret information, fact, statistics, and data in attempting to answer the study's research questions. Inferences will be made of the meanings created for qualitative data whereas basic descriptive

statistics on quantitative data will be analyzed to produce trends that will be interpreted in the process of answering the set research questions.

Before delving into the success of spa tourism in Europe, this study recognized the prior need to understand the nature of spa tourism in Europe. According to a study that was done by the European parliament's directorate-general for internal policies, spa tourism is regarded as one of the three facets of health tourism undertaken in Europe, and the other two are medical tourism and wellness tourism (European Parliament, 2017, p. 9). The widely regarded definition of spa tourism in Europe is; the kind of tourism concerned with relaxation, beautifying, and healing of the body in spa using preventive/wellness or curative/medical techniques (Smith & Puczkó, 2015, p.10). Spa tourism in Europe thrives without any explicit European Union Policies to support it (European Parliament, 2017, p. 9). Therefore, we can term spa tourism as a significantly resilient form of tourism in Europe. Although some organizations, such as Global Wellness Institute (GWI) considers spa tourism to exist under wellness, EU takes it as a distinct type of health tourism for the simple fact that it combines medical elements found in medical tourism and non-medical elements found in the realm of wellness tourism (European Parliament, 2017, p. 17). Therefore, Spa tourism in Europe emerges as a resilient form of health tourism that exists independent of wellness as opposed to the vast literature that places it under wellness tourism.

The leading destination of spa tourism that spread across health and wellness aspects in Europe include Finland, Bulgaria, Ireland, Spain, and Germany. Others are Italy, Hungary, France, Sweden, and Poland among others (European Parliament, 2017, p. 9). Much of the spa tourism in Europe in terms of products and services are most concentrated in Central and Eastern Europe where spas linked to medical water have had a very long history (Smith & Puczkó, 2014). In the European spa sector, the element of water plays a pivotal role because of its relationship with "taking water" (Ellis, 2008). In the advent of modernity, more elements have been added to the European's concept of SPA where people are now attending spa not for healing but for the pursuit of relaxation, beauty, health, inspiration and in the end for sexual pleasure (Ellis, 2008). The outcome of this development is that spas are increasingly viewed as a preserve of the wealthy (Hyde-Smith, 2012). This transformation came with massive disuse of spa, a trend that has effectively been reversed giving rise to the currently booming spa tourism in Europe, especially in Hungary and Slovenia (Hyde-Smith, 2012). This analysis shows that spa tourism in Europe is successful; however, numerical facts that offer empirical evidence tend to significantly cement such conclusions.

According to statistics from the Global Wellness Institute, Europe still leads in spa tourism across the world (GWI, 2018). Table 2 below shows the wellness economy between 2015 and 2017 and spa economy as one of the major components of it within the same period.

Using data from Table 2, the global spa economy in 2015 was \$98.6 billion which represents approximately 2.65% of the global wellness economy which was estimated to be \$3,724.4 billion. In 2017, the global spa economy was estimated to stand at \$118.8 billion which translated to 2.82% of the global wellness which was

approximately \$4220.2 billion. The growth of the global spa economy compared to the global wellness economy from 2.65% in 2015 to 2.82 % in 2017 shows that the former is growing but at a moderate rate. In terms of average annual growth rate, the global spa economy experienced a higher rate of 9.8% compared to that of the global wellness economy which stood at 6.4%. This result means that the global spa economy is succeeding, but what about the European spa economy.

Table 2. Market Size - Global

Tourism component	Market Size (Billions of US \$)		Average Annual Growth Rate
	2015	2017	2015-2017
Spa Economy (Global)	98.6	118.8	9.8%
Wellness Economy (Global)	3,724.4	4,220.2	6.4%

Source: Global Wellness Institute (2018)

Table 3 contains data from GWI of the European spa economy compared to the global spa economy for the period 2015-2017. Using this data, the growth trend of the European spa industry can easily be established to determine whether the spa industry has succeeded in Europe.

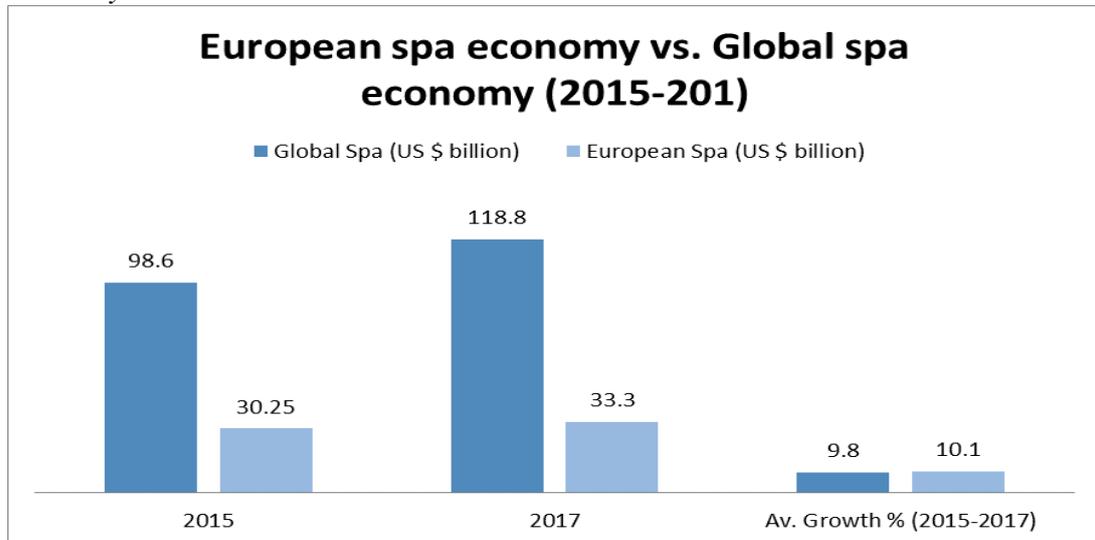
Table 3. Market Size - Europe

Tourism component	Market Size (Billions of US \$)		Average Annual Growth Rate
	2015	2017	2015-2017
Spa Economy (Europe)	30.25	33.3	10.1%
Spa Economy (Global)	98.6	118.8	9.8 %

Source: Global Wellness Institute (2018)

An analysis of the data contained in the table above shows that in 2015 the spa tourism in Europe was approximately \$30.25 billion representing 30.68% of the global spa economy which was \$98.6 billion. In 2017, the European spa economy grew to \$33.3 billion which translates to 28.03% of the global spa economy which grew marginally to stand at 118.8 billion. In comparing the average annual rates for the period 2015-2017 the European spa economy had a higher rate of 10.1% compared to the 9.8% for the global spa economy in the same period.

Graphically, the European spa economy can be compared to the global spa economy and the global wellness economy for the period 2015-2017 to establish the trend in its growth rate.

Graph 1. Growth Trends between Spa Tourism in Europe versus Global Spa Economy

Source: Author's construction

From Graph 1 it is clear that the European spa economy is succeeding because it has a higher average annual growth rate of 10.1 % which is even greater than the global average of 9.8 % in the period. The contributions of \$ 30.25 billion and \$ 33.3 billion of European spa economy relation to \$ 98.6 billion and \$ 118.8 billion of the global spa economy in 2015 and 2017 respectively are significantly high to conclude that spa tourism in Europe has succeeded as part of wellness tourism in the continent to a great extent. Therefore, we can reject the study's null hypothesis (H_0) that; spa tourism has not significantly succeeded in Europe.

Conclusion

Spa tourism is one of the major components of health tourism. In most cases spa tourism is considered to be under wellness tourism, however, in Europe, it is often regarded as a separate kind of tourism since it incorporates some elements of medical tourism and wellness tourism. Spa tourism in Europe enjoys a rich and very long history. In Europe spa tourism is closely linked to water because of the long history where thermal spring water was used for healing. There are many types of spa present in Europe and these include, club spas, hotel spas, destination spa, thermal water springs, and cruise ship among others. Equally, the spa tourism sector in Europe offers a wide array of services which include hydrotherapy, thalassotherapy, balneotherapy, and cosmetic therapies among others. Empirically, spa tourism in Europe is growing faster than the global spa average and therefore, we concluded that spa tourism has greatly succeeded as part of wellness tourism in Europe.

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The Role of Travel Agencies' Abilities in Structural Changes of Rural Settlements of the Route and Destination of Tourism

By Naser Shafieisabet & Saeideh Haratifard[‡]*

Tourism and travel agencies play a crucial role in attracting tourists and organizing nature-friendly and clean tours, which can contribute to structural changes in rural settlements that serve as the route and destination of tourism. This research was undertaken to determine the role of abilities of tourism and travel agencies of Tehran in structural and functional changes of marginal rural settlements and opportunities that they provide in Tehran using a quantitative-field study method. The statistical population included 192 tourism and travel agencies in Tehran in 2017, which were selected from 947 tourism and travel agencies in Tehran (data was obtained from the Iran Cultural Heritage and Tourism Organization 2017), based on field studies and visits on these agencies. The sample size was calculated by Cochran formula and its modulation formula ($n= 77$), was selected using a systematic and random sampling method and direct inquiry. Data analysis was performed to explain the relationships between independent and dependent variables using SPSS 23 software. Findings of the research exhibited a significant relationship between the abilities of travel agencies and the number of organized tours. However, there is no meaningful relation between the abilities of travel agencies and so it is important to increase the rate of tourist attraction and to form and develop accommodation and catering infrastructure. Therefore, the abilities of travel agencies of Tehran, as endogenous factors, by raising awareness about the tourism attractions of Tehran and encouraging potential investors to venture on accommodation and catering infrastructure in the tourism destination, play a pivotal role in the improvement of the spatial system of Tehran, by supporting functional and structural changes.

Keywords: *Travel agencies, Tehran, Rural and Tourism Development.*

Introduction

Tourism developments, in terms of the number of tourists and the development of residential and catering infrastructure, have been affected by the expansion and capability of travel agencies, especially in recent decades. Travel agencies with appropriate notifications have increased tourism attraction, and as a result the structure of tourism in the tourism centers has changed (Aramberri and Butler 2005: 174-175, Marin-Pantelescu 2019).

Utilizing the facilities of advanced information technology and the efficient use of it by travel agencies in most tourist-receiving countries will help the improvement of the relationships of the tourism spatial organization. Providing

* Assistant Professor, Shahid Beheshti University, Iran.

[‡]PhD Student, Shahid Beheshti University, Iran.

information on the facilities and attractions of destinations and the reservation of places as a network of products delivered at destination have made it possible to attract customers more than ever (Fay 1992: 201, Badan 2007: 93, 177, Leung et al. 2015: 66). In terms of tourism, travel agencies in developed countries, by using the experienced and trained staff in accordance with international standards and by holding workshops and training conferences for the employees, enhance their performance, and as a result, they attract tourists increasingly, and develop infrastructure.

In this regard, in Iran and especially in Tehran, despite the relatively large expansion of travel and tourism agencies over the past two decades, there have been many problems in various structural fields, such as the weak Internet communication infrastructure, the unrelated education of office directors of the tourism specialty, the entry of unexperienced people into travel and tourism agencies and the lack of employment of tourism-related graduates at these agencies. Also, the emerging tourism education and the low level of awareness of new methods of notification and poor recognition of tourist attractions in the region of Tehran have reduced the quality of training courses and undermined the notification. In addition, the lack of logical communication between the managers and employees of travel and tourism agencies with the authorities of residential and catering centers in the tourist areas and the lack of participation of travel agencies and managers of residential and catering centers in the development of tourism rules and regulations caused that the motive for the investment in residential and catering infrastructure to be very weak in the tourism centers. Based on these challenges, the travel agencies in Tehran have not much succeeded in touring and attracting passengers and, as a result, in the development and expansion of residential and catering infrastructure. Therefore, it is of particular importance to study the spatial impact of technical capabilities and specialty of travel and tourism agencies in Tehran on the tourism attraction and the development of residential and catering infrastructure of tourism centers in the Tehran region for providing scientific solutions in this area.

Theoretical Background

Tourism has multifaceted concepts. Sankrusme (2017: 20), Smith (1988), Mieczkowski (1981), Hall and Page (1999) consider that: “researchers and scholars do not agree upon the concepts of tourism and have problems with the meanings and concepts of tourism”. Therefore, there is no standard meaning for tourism that researchers can cite as a reference. As a result, researchers spend time on classification and controversial typologies rather than exploring and finding the real content of tourism, leisure or recreation. In this way, Pigram (1985) argues that tourism is a part of recreation and leisure time (Moses 2016), while Murphy (1985) poses the contrary. However, Dann and Cohen (1991) note that there are researchers who take an eclectic approach and do not rely on a particular theoretical approach. In this case, the researchers adapt to their chosen meanings according to the work needs. Smith (1988) states that researchers, international

and national tourism associations, commercial companies and government agencies provide different definitions based on their understanding and the field of interest, so that research work sponsored by tourism and related policies ensure tendencies towards the tourism priorities (Awang et al. 2009: 67-70). However, researchers define tourism in their inferred field. In this regard, Jafari (1977) states: "Some researchers define tourism according to the anthropological perspective: Tourism is the study of human beings apart from their usual residence, and the study of this industry responds to their needs, as well as the study of the positive and the negative effects which affects both human beings and tourism in the social, cultural, economic, and physical environment of the host" (De Esteban et al. 2015: 8).

Murphy (1985), quoting Smith (1988), considers tourism as the total travel of non-resident people to destinations, until their residence is temporary and has not become a permanent residence. It is a combination of leisure and business. However, Shaw and Williams (1994) argue that the definition of the World Tourism Organization (WTO) for tourism and tourist is most commonly used in the tourism literature. "Anyone living in a country, regardless of nationality, who travels to a place within the country other than his permanent residence for less than 24 hours or one night, with a purpose, except for performing a mission in that location" (Vanhove 2011: 4, Jafari and Xiao 2016: 953). The motives of this trip can be:

1. Leisure (entertainment, holidays, treatment, study, education, religious and sports).
2. Business, family, mission, and meeting (WTO 1981: 89).

Smith (1995, 1988) argues that the definition of the WTO provides some guidelines for the collection of statistical information. Therefore, it provides a fully agreed-upon reference. These guidelines are not only a tool for researchers, governments, and institutions to measure and evaluate the growth of tourism within their borders, but also a tool for comparing them on a global scale (Awang et al. 2009: 70).

Smith (1988) and Britton (1991) argue that tourism function is largely devoid of a theoretical framework, which is due to the fact that many participants are trained in other related fields and thus, are not included in the introduction and complexity of social and cultural process variables. Tourism studies are concerning concepts and theories that are mainly taken from other social sciences, including geography. Although many researchers do not know its origin (Goeldner et al. 2000), the concepts and structures derived from geography often form the basis of research on tourism. However, dynamic processes involving tourism destinations can be understood using the techniques such as spatial analysis (Pearce 1995, Johnston 1997). On the other hand, Pearce (1979) identifies six major professional fields of geographic dimension in the study of tourism: spatial dimensions of supply, spatial dimensions of demand, patterns of tourism flow, tourism effects, geography of resorts, and tourism spatial models.

Erstwhile, Oppermann (1993) suggest that the current tourism theories have been extended regarding two main patterns: the pattern of distribution and the pattern of dependency. Both patterns have the structure of spaces and places in nature (Crang 1997). However, in literature, tourism-related topics have been discussed as a regional growth factor. Therefore, tourism growth is spreading from the central to the peripheral regions (Awang et al. 2009: 73, Saarinen et al. 2017: 309). On the other hand, it considers the controlled peripheral region relative to the central region in the context of the peripheral countries to be fully examined (Brown and Hall 2000). Accordingly, the development of tourism in the peripheral centers of the regions and areas is entirely under the influence of events in the core centers. The massive flow of tourists from the core to peripheral centers focuses establishes the hotels, resorts, and so on (Britton 1991, Shafieisabet and Haratifard 2019). The role of travel agencies in the core centers as one of the most influential providers of tourism is due to their enormous financial resources, which can have a large impact on the occupancy of hotels and the spatial distribution of tourist flow in the receiving areas, many of which are similar to the peripheral areas (Shaw and Williams 1994). In this regard, Frank (1980) states: "The sectors of an underdeveloped economy, in fact, are integrated in the structure of the contiguous metropolitan relationships." As a pattern, he states that the whole chain of metropolitan area and surroundings is formed, and the commercial centers, tourism services, etc., flow from the metropolitan area to the peripheral centers (Papoli Yazdi and Rajabi Sanajerdi 2009: 99). Walpole and Goodwin maintain that the relationship between the core and peripheral tourism centers indicates that the distributive economic inequalities are more in favor of foreign operators and urban centers than rural settlements (Walpole and Goodwin 2000). In contrast, Shafieisabet and Haratifard (2015) consider a two-sided relationship between the core and the periphery, so that, in addition to the evolution and development of urban centers, it can provide employment for the local activists in the peripheral tourism centers (Shafieisabet and Haratifard, 2015: 6).

The global chain of events, including the economic recession created between the mid-1970s and the mid-1980s has led to an increase in neoliberalism and privatization in the development of tourism in many developing countries (Desforges 2000). Privatization and liberalization measures reduced the government role, and at the same time, provided the increasing role and importance of the private sector in the tourism industry (Awang et al. 2009: 70). According to the liberalism and neoliberalism view, the privatization and reduction of government role in the transformation and development of tourism has increased the share of the private sector in the tourism industry. In this context, the role of capabilities of travel agencies as one of the private enterprises in the structural changes in tourism is very significant (Haratifard 2009: 38).

Also, the results of the research by Negi (2004) in India show that travel agencies play a major role in attracting the tourists. If the government can expand the agencies and provide facilities for them, these agencies can attract a lot of tourists (Negi 2004: 143-144). The study of Badnjevic and Padukova (2006) in four major Indian cities shows that despite the remarkable impact of the information technology level in the developed countries, in India, despite the potential tourism

opportunities, because of the relatively low level of information technology, lack of awareness and training of company employees of information technology and the bureaucratic dependences of the companies and physical problems in infrastructure and cultural and social laws governing different parts of India, tourism has not been developed as it should be (Badnjevic and Padukova 2006: 76). The studies of Koc (2003) in Turkey show that the lack of understanding of staff and managers about the motives and needs of tourists and the lack of brochures in tourist-receiving areas prevented the travel agencies from attracting tourists in a desirable level (Koc 2003:143-144). The studies in Iran showed that most people working in the field of tourism do not have enough experience and related education. As a result, due to the lack of knowledge and awareness of tourist attractions (such as providing information), they are not well notified about touristic attractions (Shafieisabet and Haratifard 2015). Josmani (2007) studied the criteria for choosing domestic travel tours in Malaysia. The research findings show that the experience and information of the tour guide and the appropriate means of transportation and the food intended for the travel package are effective in attracting tourists (Josmani 2007: 1). Campo (2008) stated that the quality of products and the awareness of the agencies of the tourist areas and the provision of desirable information influenced the loyalty of tourists to the travel agencies, and were effective in attracting tourists by travel tours and as a result, in tourism development (Campo 2008: 321-326). Therefore, based on the background of the research, the research hypothesis is formulated as follows: The desirable notification of travel and tourism agencies can have a major impact on the increase of tourist attraction and the changes in the tourism spatial system.

Methodology

In order to accurately explain the issues and research hypothesis, the present study uses a descriptive-analytical method with the quantitative field study to explore the impact and consequence of empowerment of Tehran travel agencies in the structural changes of tourism in Tehran. The background and field observations were used for explaining the research variables, so that the dependent variable of the research (structural changes) is assessed by indicators such as tourist attraction level, number of implemented travel tours, and change in the level of residential and catering infrastructure, and the indicators such as education and specialty of directors and staff of agencies, level of staff training for the knowledge of new methods, history of the agencies and the amount of notification are considered for the independent variable of the research (impact of notification of travel agencies in Tehran). The statistical population of the study consisted of 192 travel agencies operating in the field of tourism in Tehran. They were selected from 947 travel and tourism agencies in Tehran,[†] based on the field survey and the visit of all of the agencies. The calculated sample size based on the Cochran formula and its adjustment formula is 77 agencies which were selected by the simple random sampling method and were directly questioned (Sarai 2012:136-137). To explain

[†]Data comes from the Cultural Heritage and Tourism Organization 2016.

and analyze the data, descriptive statistics methods were used, and to compare the two groups of agencies that were or were not notified about the tourism in Tehran, the Kruskal-Wallis test was used, and also to determine the relationship between the independent and dependent variables of the research, the Spearman correlation coefficients and the chi-square test and t-test were used.

Analysis of Results

Capability of Tourism Spatial System in Tehran

The non-urban spaces of the Tehran area feature great natural, historical and cultural capabilities and attractions for attracting the tourists, so that in different mountainous, plain and desert territories according to different seasons and geographical features, they are suitable for all types of travel tours (Table 1). Also, due to the proximity of Tehran tourism centers to the Tehran metropolitan area and the vast need of residents of other major cities in Tehran metropolitan system, various territories of Tehran are well suited to the leisure time and tourism during the week for the revitalization and relief of fatigues (Haratifard 2009: 88-104). Hence, in the past two decades, tourism in the non-urban areas of Tehran has become widespread in different seasons, so that according to the data from the Iranian Center for Statistics in 2016, the hotel and restaurant sectors as the major tourism-related sectors employed 33,137 people in the region of Tehran, which accounts for about 2.1% of the employees in the service sector of Tehran and 1.6% of the service sector in the Tehran region. Also, in the region of Tehran, there were 1051 travel and tourism agencies, with an average of 5 people working people and a total of 5,255 people employed in these agencies (ibid: 111-112).

Education Degree and Type of Managers and Staff of Travel Agencies

The research findings showed that about 24.7% of managers had education lower than bachelor degree, 64.9% at the bachelor level and 10.4% had master degree and higher. The result of Kruskal-Wallis test shows that there was no significant difference between the level of education and the level of tourism attraction by Tehran travel agencies in the 95% confidence level. In other words, the increased level of education, in addition to reducing the tourist attraction, has made the situation more consistent in this regard (Table 2).

Table 1. Spatial Distribution of Tourism Areas by Number of Tours and Number of Tourists in Non-Urban Spaces of Tehran Region in 2016

Place name	Number of tours	Number of tourists
Ab Ali	1	30
Emamzadeh Davood	16	330
Tangeh Vashi	999	23,737
Darband	1	15
Darreh Ousoon	1	30
Tar Lake	7	150
Shekar Ab	2	50
Rudafshan Cave	1	20
Fasham	5	100
Taleghan	161	3,095
Gachsar	4	100
Dizin	76	2,095
Shemshak	31	900
Shahrestanak	29	580
Maranjab desert	35	1,015
Gajareh	6	240
Chalous Road	12	250
Lar Dam	-	-
Total	1,387	32,737

Source: Data from 77 travel and tourism agencies of random sample of Tehran in 2016.

Table 2. Distribution of Respondents according to Level of Education of Travel Agencies Managers in Tehran Until 2016

No.	Education level	Number	Percentage	Average classification
1	Diploma	17	22.1	32.15
2	Advanced Diploma	2	2.6	49.25
3	Bachelor	50	64.9	39.34
4	Master degree and higher	8	10.4	48.88
Total		77	100.0	—

The significance level calculated according to Kruskal-Wallis test is equal to 0.308. Since the level of significance is more than 5%, the relationship is not significant.

In fact, about 75% of travel agency managers had a bachelor degree and higher, but only 19.5% had expertise in tourism. The education of about 80% of agency managers was unrelated to tourism. This issue also applies to office staff, so that about 52% of the staff had bachelor degree or higher, of which about 20% were educated in tourism. Therefore, the unrelated type of education for the staff and managers was an effective factor in the failure of the travel agencies in Tehran to increase the number of tours and the tourist attraction level.

Level and Type of Training for Managers and Staff of Agencies and their History of Activities

Based on the information obtained from the questionnaire of travel agencies in Tehran, 90.9% of managers and employees had completed their training courses by 2016 and 9.1% did not attend any training courses. Among those who completed the courses, 45.7% attended the technical management course, 15.7% the ticket sales and 2.9% the tour guide course, and 27.1% of the managers and staff attended the technical management and ticket sales courses. The result of Kruskal-Wallis correlation test showed that there was no significant difference between the training courses taken by the managers and staff of the agencies and the number of implemented tours ($P > 0.232$). In other words, taking various courses in the field of tourism not only had no effect on the increase in the number implemented tours, but also contributed to the more consistent situation of the agencies in terms of number of tours (Table 3).

Table 3. *Distribution of Respondents in Terms of Implemented Training Courses Taken by Managers of Travel Agencies in Tehran in Field of Tourism Attraction Until 2016*

No.	Education courses	Number	Percentage	Average classification
1	Technical management	32	45.7	29.44
2	Ticket sales	11	15.7	40.14
3	Tour guide	2	2.9	44.00
4	Technical management and ticket sales	19	27.1	37.29
5	Technical management and tour guide	1	1.4	36.00
6	Technical management, ticket sales and tour guide	4	5.7	53.75
7	Ticket sales and tour guide	1	1.4	54.00
Total		70	100.0	–

The significance level calculated according to Kruskal-Wallis test is equal to 0.232. Since the level of significance is more than 5%, the relationship is not significant.

The reason for the insignificant effect of the training courses taken by the managers and staff on the tourist attraction level and the number of implemented tours, in addition to the unrelated education degree of managers and staff of agencies to tourism, is the low level of courses and the short tenure duration for the managers and staff is in the field of touring and the job change for most of them. Thus, the experience of most staff and managers of travel agencies in Tehran is short for attracting tourists and the provided training courses are also wasted.

In this regard, the research findings showed that 37.7% of travel agencies in Tehran had a history of 1 to 5 years, 32.5% were between 6 and 10 years, about 5% between 15 and 30 years, and around 5% have more than 30 years of experience. Altogether, about 70% of agencies had the history of establishment less than 10 years and about 90% had less than 20 years (Table 4).

Table 4. *Distribution of Respondents according to History of Establishment of Travel Agencies in Tehran in Terms of Tourist Attraction until 2016*

Establishment history (years)	Number	Percentage	Cumulative percentage
1-5	29	37.7	37.7
6-10	25	32.5	70.2
11-15	15	19.4	89.6
16-20	3	3.9	93.5
21-25	0	0	93.5
26-30	1	1.3	94.8
More than 30 years	4	5.2	100
Total	77	100	–

The significance level calculated based on chi-square test is 0.002 in relation to the tourist attraction level. Since the significance level is less than 5%, the relationship is significant.

The Chi-square test showed that there is a significant difference between the tourist attraction level by Tehran travel agencies in relation to tourism in Tehran and the history of agency activities ($P < 0.05$). That is, the more experience the travel agencies, the more the number of implemented tours and the number of attracted tourists in the region of Tehran.

Knowledge and Notification of Agencies of Tourist Attractions in Tehran Region

Based on the data of the questionnaire of travel agencies in Tehran, about 40% of travel agencies had little or very little knowledge of the tourist attractions of the rural centers of the Tehran region. 32.3% had fair and 27.7% had high knowledge of the tourist attractions of Tehran. The limited knowledge of the staff and managers of travel agencies in Tehran in terms of tourist attractions in Tehran area affects their notification, so that 27.3% of the agencies had a low notification level, 29.9% fairly notified, and 42.8% highly notified of tourists through advertisements in newspapers, agency website, internet, brochures, leaflets, SMSs, faxes, contracts with companies and government agencies in the field of provincial tours (Table 5).

Table 5. *Distribution of Respondents according to Notification Level of Travel Agencies in Tehran in Field of Tourist Attraction up to 2016*

Notification level	Number of tours			Number of tourists		
	Number of agencies	Percentage	Average classification	Number of agencies	Percentage	Average classification
Low	21	27.3	21.9	21	27.3	23.19
Medium	23	29.9	41.15	23	29.9	37.54
High	33	42.8	48.83	33	42.8	50.08
Total	77	100	–	77	100	–

The significance level calculated based on Kruskal-Wallis test between the notification level and the number of tours implemented in Tehran province is $P = 0.000$. Also, this calculation for the notification level variable and the tourist attraction level is also $P = 0.000$. Since the significance level is less than 5% in both variables, number of tour and tourist attraction level, the relationship is significant.

The results of Kruskal-Wallis test showed that there is a significant difference between the notification level and the number of implemented tours and the tourist attraction level ($P=0.000$). That is, the higher the notification level and activity of travel agencies in this field, the higher the tourist attraction level and number of tours.

Development and Expansion of Residential and Catering Infrastructure

In the review of travel agency questionnaire data in Tehran, it was found that there is no significant relationship between the tourist attraction and the amount of residential and catering infrastructure during 2015-2016. As the significance level F (0.057) indicated, there is no significant difference between the tourist attraction level and the amount of residential and catering infrastructure (Table 6). In fact, the tourist attraction level and the amount of residential and catering infrastructure are not proportional, so that many tourist centers of the non-urban areas of Tehran annually attract a lot of tourists, but lack the least amount of residential and catering infrastructure. In other words, the tourist centers of Tangeh Vashi, Rudafshan Cave, Tar Lake, Shahrestanak, and Varamin Desert having the most tourism destinations lack any residential and catering infrastructure and the sanitation facilities. Also, the tourism centers of Ab Ali, Emamzadeh Davood, Fasham, Gachsar, and Chalous Roads are of medium infrastructure, and only the tourism centers of Shemshak, Dizin and Gajareh have good infrastructure facilities.

Table 6. Relationship between Tourism Attraction Level and Amount of Residential and Catering Infrastructure in Tourist Centers of Tehran Province in 2016

Change Source	Squared sum (SS)	Degree of freedom (df)	Mean square (MS)	F	Sig.
Intergroup	7218344.282	2	3609172.141	11.428	0.057
Intragroup	EV2.305 EV	73	315806.102		
Total	3.027EV EV	75			

According to the calculations carried out in relation to the situation of residential and catering infrastructure of the tourism centers of Tehran, among the total 77 travel agencies in Tehran, 66 agencies equal to 85.7% had low amount of residential and catering infrastructure for tourism centers where the tours are implemented, 6 agencies equal to 7.8% had moderate amount of infrastructure, and finally, 5 agencies equal to 6.5% had large amount of infrastructure. The significance level between the amount of residential and catering infrastructure and the tourists ($P>0.315$) indicates that there is no significant relationship between the two variables with 95% confidence level (Table 7).

Table 7. *Situation of Residential and Catering Infrastructure of Tehran Tourism Centers in Terms of Office Managers Until 2016*

Infrastructure Situation	Number	Percentage	Subset for alpha = 0.05	
			1	2
Low	66	85.7	308.74	
Medium	6	7.8	1014.17	1014.17
High	5	6.5		1455.00
Total	77	100.0	Sig. 0.057	Sig. 0.315

Tukey HSD^{a,b} = 6.947, Sig. 0.315.

Although relatively good information is provided on tourism centers and there is a positive significant correlation between the agency notification and the number of implemented tours and the tourist attraction, (99% confidence level) ($P= 0.000$), there is no significant positive correlation between the notification level of agencies and the development of residential infrastructure ($P> 0.254$). Also, there is no significant positive correlation between the notification level of agencies and the amount of catering infrastructure ($P> 0.143$). Table 8 shows the relationship between the independent and dependent variables in this regard.

Table 8. *Relationship between Notification level of Travel Agencies and Tourist Attraction Level and Amount of Residential and Catering Infrastructure by 2016*

First variable	Second variable	r_s	P
Notification level of travel and tourism agencies in Tehran	Number of implemented travel tours	0.749**	0.000
	Tourist attraction	0.763**	0.000
	Number of residential infrastructure	0.114	0.254
	Number of catering infrastructure	0.218	0.143

Conclusions and Suggestions

The structural changes in tourism in the non-urban spaces of the Tehran region, rather than a change for the comprehensive and endogenous development of tourism based on the recognition of capabilities and the spatial constraints, is a one-dimensional change merely made to increase the relative number of tourists, so that the travel agencies of Tehran have been effective as an endogenous factor in the tourism spatial system for the implementation of travel tours on the level of tourist attraction. This issue is similar to the results of Lickorish and Jenkins (1997), Santos (1998), Koc (2003), Negi (2004), Badnjevic and Padukova (2006), Josmani (2007), Campo (2008), Shafieisabet and Haratifard (2019) but did not succeed in developing and expanding the residential and catering infrastructure. Such a process reflects the different characteristics of the tourism spatial system of Tehran in comparison with previous studies in other countries and is not similar to the findings of previous researchers. Therefore, unlike other tourism centers in the

previously investigated regions, in the non-urban spaces of Tehran, there is a particular form of tourism, mostly of one-day. In the places where tourists tend to stay overnight or a few days, they are forced to use tents. Thus, tourism and touring in the Tehran region does not have a significant profitability. In this way, travel agencies do not have the motive to expand travel tours in the region of Tehran, and therefore, they do not provide much information on the field of tourism centers in Tehran. Also, the unrelated type of education of staff and managers of the agencies of tourism expertise, the low level of courses in expertise training, the short tenure duration of managers and staff in the field of touring, the job changes due to the low profitability of touring in Tehran region, the low capability and knowledge of the agencies of the attractions and tourism centers in the non-urban areas of Tehran, and consequently the lack of reasonable communication with the owners of existing residential and catering facilities and those who are willing to invest in the residential and catering infrastructure, caused insufficient investment for developing and expanding residential and catering infrastructure. Therefore, in order to overcome the existing challenges, the following suggestions and strategies are presented based on the scientific findings of this research and the views of managers and staff:

- Use experienced professors to introduce to the managers and staff of the agencies, the natural, religious, cultural and historical attractions in the region of Tehran and the tourism activities applicable in each one of the tourism areas.
- Introduce to the managers and staff, innovative ways of notification and marketing.
- Introduce tourism places and routes in the Tehran region through the map and brochure and provide them free of charge to the agencies and tourists through the website of the Cultural Heritage and Tourism Organization or by simple delivery to the agencies.
- Introduce residential and catering facilities in Tehran to notify managers and staff of agencies and tourists about the availability of residential and catering centers in the touristic areas.
- Adopt supportive policies by the Cultural Heritage and Tourism Organization to encourage agencies to closely cooperate with the hoteliers and restaurant owners for developing and expanding residential and catering infrastructure of tourism destinations.
- Improve information infrastructure, such as creating a network of tours designed by the agencies, connecting agencies together and strengthening the online tour reservation.
- Prepare and provide documentary reports of regional attractions and related touristic seasonal activities in the media to encourage people to travel to these areas.
- Facilitate the rules and regulations for investment in tourism in the region of Tehran.
- Notify tourists of group trips and their benefits.

In addition to the above points, the change in the spatial tourism system will cause significant physical-spatial changes in the urban and rural areas of Tehran.

Notes

(1) How to calculate sample size:

$$n = N \cdot t^2 \cdot p \cdot q / N \cdot d^2 + t^2 \cdot p \cdot q$$

N = Statistical population (192 agencies)

n = Sample size

P = 0.5, Probability of effect of independent variable on dependent variable

q = 0.5, Probability of lack of effect of independent variable on dependent variable

t = 1.96, with 95% confidence level

d = 0.05, degree of confidence

$$n = 192 \cdot (1.96)^2 \cdot 0.5 \cdot 0.5 / 192 \cdot (0.05)^2 + (1.96)^2 \cdot 0.5 \cdot 0.5 = 128$$

And the ratio of n to N for this estimate is adjusted by the following formula:

$$n = n / (1 + n/N) = 128 / (1 + 0.66) = 128 / 1.66 = 77$$

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The Digital Nomad Tourist Motivation in Bali: Exploratory Research Based on Push and Pull Theory

By I Wayan Sukma Winarya Prabawa* & Putu Ratih Pertiwi[‡]

Tourism has grown tremendously over last few decades in Indonesia. Thanks to its natural beauty and cultural uniqueness, tourism is packaged in various forms such as rural, urban, cultural, shopping tourism with their own characteristic of respective market segments. Bali as a leading tourist destination in Indonesia for decades is well known for its cultural tourism which was popularized by European writers and artists. In addition, the beautiful beaches also encourage the number of surf tourists to come and gradually revolutionizing the coastal areas of southern Bali into tourist areas. With the facilities advancement that supports the world society mobilization and also the increasingly dynamic use of technology, Bali is now increasingly in demand by groups of tourists known as digital nomadic. The existence of this market certainly attracts the attention of tourism authorities in many countries, including in Indonesia. Massive promotions about nomad friendly digital Indonesia have been carried out by the Indonesian government. The research aims to explore the internal and external motivation of digital tourist nomads who come to Bali based on push and pull factor theory. The aim is to provide an overview of self-internal driven and external factors of digital nomads that potentially to attract them to come. At the end, it is expected to give an insight to the authorities to execute the right strategy on this potential market. Through a factor analysis technique with 150 digital nomads as respondents, this research results 2 common factors formed on push factors, they are; 1) motivational factors related to work matters; 2) enlarging network. Whereas the 3 common factors formed for pull factors are; 1) inspiring destination; 2) supportive place to stay and work; 3) enjoyable activities.

Keywords: Digital, nomad, destination, tourism, Bali

Introduction

Post-modernism, lifestyle and technological advances have a major influence on the activities of the global travel and tourism industry. Today more and more people are looking for independence, traveling for a variety of good reasons for things that are very important to meet personal curiosity and hedonistic desires (Richard 2015, Muller 2016). This was also emphasized by Mouratidis (2018). He explained that the evolution of work, technology and nomadic work styles in synergy has broadened the choices of workers who have certain specializations to carry out their professional activities anywhere in the world.

The terms of nomad known today has changed considerably from its original meaning. Initially the term nomadology reflects the conflict between state power and individual freedom (Deleuze and Guattari 1986). But in this context, discourse

*Lecturer, Tourism Destination Department, Bali Tourism Polytechnic, Indonesia.

[‡]Lecturer, Faculty of Tourism, Udayana University, Indonesia.

about nomads is directed towards phenomena between a settled work life or the choice to choose a location independently. D'Andrea (2007) and Cresswell (1997) argued that mobilization is a new order in life today (order of the day) where nomads, immigrants, travelers and explorers exemplify a new fluidity in global life.

In the context of tourism phenomenon, nomadic tourism has become a discourse of product and market development which is aggressively promoted many developing destinations like as Indonesia. As a country that relies on the tourism sector as a foreign exchange earner, the authorities have packed various strategies to gain this market share. The target of 20 million tourists in 2020 requires them to develop a market share that is believed to have a large influence, namely millennials which associated with nomadic tourists (Kemenpar 2019). Types of nomadic travelers or tourists are varied. Observing a phenomenon that is developing in regions today, it is said the digital nomad is a type of markets which is currently growing quite significantly. Digital nomad traveler is individual who take advantage of the use of digital technology to work and more generally live a sedentary lifestyle (Mohn 2014). Moreover Thompson (2018) added that digital nomadic is someone who decides to work independently and utilize technology so that it is not bound by time and place. Even though the terms of nomad have plenty of types, those who live and work in a destination, utilize internet media for their work activities known as nomad digital. From these points of view, it can be underlined that nomadic tourism is very closely related to the digitalization of the tourism industry.

According to Mouratidis (2018), the term of digital nomad comes from "digital" which means to involve or relate to the use of computer technology and "nomad" which refers to members who wander from one place to another without limits. In addition, he emphasized that digital nomadic travels commonly are driven with 2 or 3 more motivations such as holiday without leaving work assignments or working where he goes on vacation. This tourist groups are very closely related to digital element, e.g., the internet or communication in cyberspace.

Nomadic travel and its activity behavior are indeed very interesting to discuss. In an article cited from justtraveling (2016), it states that this tireless traveler often even rents out their own apartment and works at night as a freelancer to pay for their travel expenses while at the same time learning the local language during the day. In terms of destination, in various internet pages, Bali especially a few regions have been awarded a lot of recognition as digital nomad friendly destinations. According to the Thalassa (2017) in an online article, she explains that there are several things offered by a nomad destination that can attract nomad tourists, including: 1) location independent professionals; 2) fight the loneliness; 3) flexibility; 4) make it easy; 5) get the ward out.

As a developing market that has attracted the attention of many countries, this research will investigate the motivation of digital nomads to visit Bali. Although there have been many articles that discuss motivation based on push and pull factors, this research will examine with more specifically subject. Driving motivation is internal desire within individual to travel for a reason such as getting out of a daily routine, spending time on vacation with family (Suhud et al. 2018).

While pull motivation is the stimulation of a destination including attractions, sights, historical sites, recreational facilities, cultural attractions, etc. Uysal and Hagan (1993) argued that knowing the motivation of tourists in choosing a destination will help the authorities to make decisions about activities and facilities that can largely satisfy the psychological needs of tourists. This study aims to explore digital nomad tourists' motivation with regard to visiting Bali as a digital nomad destination.

Literature Review

Table 1 provides a typology of the various types of nomads. Thompson (2018) said that digital nomads are workers who work remotely and usually work in the fields of web design, programming or online marketing. He also added that digital nomads are a very different type of worker from telecommuter workers in the past few decades becoming a trend where people choose to work from home so they can save on transportation, avoid work disturbances at work and flexible schemes for activities to look after children at home. Cited from an online article, Rowland (2011) conducted a small survey which concluded that digital nomads are highly influential people. They produce digital content that motivates through creative and innovative ideas about problems faced by many people, while in other places other people are regularly busy.

Unlike other market shares that have similar characteristics or preferences, the nomad market seems to have a great variety of characteristics. As cited from *Become Nomad* (2015), it describes in practice the variations of the nomad's characteristic in their traveling activities. For example, the digital nomads that have a dependency on the use of technology during their travel activities must be attracted by internet connection, inspiring workplace and supportive atmosphere. Another type that is no less interesting is the spiritual nomad for those who has self-spiritual driven to get inner satisfaction during their stay in a destination. This type is actually quite feasible and potentially to be developed in Eastern worlds where the traditional rituals and belief are attached with society. Moreover, another worth market that still interesting be discussed is the retired nomad. This market has widely discussed by many articles especially towards their spending in a destination. The same thing can be done with the other types of nomads' travelers which indeed can be specifically analyzed to understand their push and pull motivation. This review actually gives a lot of insight about the market development that potentially to be developed by tourism authorities in destination by providing various destination attributes accordance of their needs.

Table 1. *Type of Nomads*

No	Type	Description
1	Digital Nomad	They have characteristics that like to look for new destinations, move consistently and their activities are very closely related to the use of technology. Usually this type works in building start-ups. In their tour activities, they spend more time working at spots that have good internet access on weekdays and take advantage of the time to be busy on weekends.
2	Spiritual Nomad	This type of nomad is more on spiritual goals. They look for meaning and inspiration in their travel activities by coming to destinations to interact and even share about their spiritual insights in the new place.
3	Quick time Nomad	They are workers who are able to have the opportunity and permission from the employer to take a break out vacation in a fairly frequent period of time such as 1 week off every 2 months. In the article explained that this nomad has the opportunity to travel quite intense to see the world, but certainly requires high costs to meet the target of his journey.
4	Corporate Nomad (Remote Work Nomad)	This nomad type is very easy to see from its characteristics where they work in a large company, but the task of working does not require them to be physically present at the office so they can work from home or other places with status as workers.
5	Half-and-half Nomad	Are those who are able to make a balanced activity between work time and leisure activities "cycle" in a trip. Examples of this type of nomad are seasonal employees where they work for a certain season in a particular destination and after the contract is completed, he can take a full vacation at the place
6	Offline or "Classic" Nomad	Said to be a classic nomad type. They are a group of professional workers who have competencies such as street artists, English teachers, cooks, diving instructors. They travel migrated from one destination to another to work in accordance with their fields. However, the obstacles faced are usually those who stay in low-paid destinations in accordance with the local wage. However, the article said that the advantage of this nomad is to make them integrate in a place and become part of the local community
7	Volunteer/ House-Sitting Nomad	This type of nomad is the opposite of the classic nomad. There is no money exchange on this model nomad. Traveler who comes to a place as a volunteer or house sitting with benefits such as free accommodation and food.
8	Rich Nomad	This type is the type of nomad most dreamed of by many people. They are very free and flexible in their travels. These are people who have a lot of money from lottery, family heritage or a successful career.
9	Retired Nomad	This elderly nomad traveler is those who travel nomadism which is usually for two reasons. The first at his age now only hears about the nomad lifestyle and wants to feel it, while the second can also be because of dreams that they had when they were young. But because of the demands of his life he had to raise money and even raise their children. Usually their resources in travel are retirement money so they don't have to work in their traveling activities.
10	Home Nomad	According to the article, home nomads are those who are able to build meaning and self-conscious life without having to travel. According to them, staying in their home country is adventurous that awakens and stimulates. It is not yet clear if anyone has really managed to achieve this while staying in one place, but that is something to be aspired to.

Source: Become Nomad 2015.

Perspective of Nomadic Tourism from Indonesia Government

Cited from report issued by Kemenpar (2019), it outlines the relation between nomadic tourism in the development of tourist destinations can be divided into three parts, namely:

1. Nomadic tourism attraction, is a form of attraction that provides entertainment or events for nomad tourists. Entertainment attractions can be packaged from various forms of natural, artificial and event attractions.
2. Nomadic tourism amenities are the availability of accommodation in the form of a caravan. (1) This caravan can move daily or weekly, and can be stopped in beautiful areas in tourist destinations; (2) glamping or glam-camp (glamour camping), i.e., a stay facility in the form of a luxury tent with star hotel facilities. Experience one with nature with luxurious service facilities; (3) home-pod or accommodation facilities in the form of egg houses, which can be moved for a longer time than glamping. This home-pod form is heavier than glamping, so the length of stay in a home-pod can be longer than in glamping.
3. Nomadic tourism access, is the convenience obtained by nomad tourists while heading to destinations with faster time. Type of convenience transportation to get the destination such as the presence of seaplane, helicity, or living in ships.

The Government of Indonesia, through the Ministry of Tourism in 2018, has launched a nomad destination and tourism digitization program as a quick effort to attract these types of tourist to destination. The development of the nomad tourist ecosystem in Indonesia currently is divided into three types of nomad tourists with the category of backpacker tourist. Backpackers tourists are identical to tourists who only carry a carrying bag on each trip. But in nomad tourism, the backpacker category becomes very useful for the destination, because this group of tourists utilizes digital technology in every trip. The three types of nomad tourists are described in Table 2.

Table 2. *Type of Nomadic Traveler according to Indonesian Government*

No	Type	Description
1	Glam packer	Also known as millennial nomad. Its main activity is wandering and searching for an “instagramable world”. This type utilizes digital media in documenting their activities through social media such as Instagram
2	Lux packer	Also known as luxurious Nomad. These tourists take advantage of online platforms in their travels like conde next travel. Expedia, booking.com, Airbnb, hotels.com and Agoda
3	Flash packer	Also known as the Digital Nomad with the characteristics of settling temporarily in a destination, while working.

Source: Kemenpar 2019.

According to the article, nomad tourists that will be targeted by the Ministry of Tourism of Indonesia consist of three types of nomad tourists. If observed, the Glam Packer and Lux Packer have similar characteristics which features the ability to beneficial the information technology. For Glam Packer, it is more focused on maximizing the use of tourist social media to strengthen promotion on social media, while for Lux Packer, it is more involved on intermedia utilization with activities offered by the online platform, whereas Flash packer is a type of traveler whose activities in destinations are related to work activities.

Motivation: Push and Pull Factors

In general, motivation is a need that makes a person takes action to satisfy his needs. There are several theories about tourist motivation. According to Moutinho (1993), motivation is a state of need, a condition which gives an individual impetus for some type of action which is seen as a possibility to bring satisfaction. Basically, someone traveling is motivated by several things. From various motivations that drive the trip, according to Mathieson and Wall (1982) tourist motivation (driving) can be categorized into: Physical Motivation, Cultural Motivation, Personal Motivation, Prestige Motivation and status.

1. Physical Motivation: Refreshing body and soul, health, sports participation, fun, entertainment and shopping
2. Cultural Motivation: Curiosity about other countries, communities and places of art, music, architecture, folklore, historical places, special events such as cultural festivals.
3. Personal Motivation: Visiting friends and family, meeting new people / acquaintances, new experiences in a new environment, breaking away from routine, happiness to travel, spiritually, just for the purpose of travel.
4. Prestige and Status Motivation: Hobbies, learning. Business contracts and professional goals, conferences and meetings, enhancing egos and other interests, fashion.

Crompton (1979) said that most discussion of tourism motivation always discusses the concepts of "pull" and "push". So simply, it can be said that the push factor is related to the desire of tourists to go on vacation, while the pull factor is related to the choice of tourist destinations. The theory put forward by Dann (1977) in Pull and Push Theory the decision to travel is influenced by driving factors, namely factors that come from within the individual which encourages a person to travel, such as the desire to escape from daily routines and the pull factors, factors that arise outside of the personal and attract someone to come to a tourist attraction such as the presence of attractions, culture, services (transportation, accommodation and so on) and natural beauty. After the desire to travel appears, a new destination is determined to be used as a vacation spot to fulfill that desire. The decision of tourists to visit an area is not separated from the information obtained either from brochures, friends or other promotional media

and can also be due to the experience gained before so that tourists want to visit the destination.

According to Alghamdi (2007), push factors that motivate tourists to travel consist of, escape motives, relaxation, prestige, family and friend togetherness, knowledge, sport motivations, adventure, enjoying natural resources, desire for sex, motivations of alcohol. The driving factors used to explain the desires or reasons of tourists to go on a trip are related to the motives, needs and interests of tourists, there are ten dimensions of the driving factors that have been mentioned, but which are examined in research and in accordance with the conditions on the ground which are.

The last but not least, the pull factor also has significant role of influencing the tourists' perspective in deciding their travel. Pull factors are external factors that motivate tourists to travel (Richardson and Flucker 2004). The attributes of a tourist destination apply as a pull factor which is able to attract someone to come such as attractions, culture, services (transportation, accommodation, etc.), and natural beauty (Dann 1977).

In an online article written by Dodd (2018) which describes the motivation of digital nomad like as Pieter Level (Nomadlist Founder), he said that before deciding to become a digital nomad, he (Pieter Level) was a successful online business owner but he slowly realized that working at home online made his life become mundane. With the internal driven motivation, he sparked an idea "if you can work anywhere, then why are still here"? On the other hands, pull factors as factors that attract digital nomads to come to a destination are also determined by several potential factors. Rowland (2011) summarizes in an online article that outlines that digital nomads come to a destination not only to always spend time at work. Homey place, easy access, internet connectivity and including a place to socialize are some important things that are considered to decide to come to a destination.

Methodology

The population and sample of this study are digital nomads in Bali in 2019. The nature of the population is not settled (mobile population), so the size of the population is not precisely known. Sampling is done by purposive sampling method in areas Canggu, Sanur and Ubud which according to information these places are popular for digital nomad. A total of 170 questionnaires were distributed. From the total distributed, 20 questionnaires were considered invalid because the occupation information from the sample did not indicate nomad digital work. Ultimately, valid data and received back is 150 questionnaires. There are 2 parts in the questionnaire; 1) demographic characteristics; 2) motivation for digital nomad arrivals. Factor analysis is used in this study by ranking the importance of push and pull motivation factors, then conduct exploratory factor analysis to reduce and categorize factors into common factors that can represent push and pull factors of digital nomads' motivation to Bali.

In this study, researchers used exploratory factor analysis techniques (*EFA*). To test the instrument, the researcher conducted a validity and reliability test on the instrument to see whether the instrument to be used in the field was valid or not. According to Santoso (2012) before carrying out the stages of factor analysis, validity and reliability must be tested first, then proceed with the stages of factor analysis. The stages that must be carried out by researchers are as follows; 1) Correlation matrix formation; 2) Factor extraction; 3) Rotation matrix; 4) Giving the name of the vector is a stage for the interpretation of the factors formed. It was considered to be able to represent the variable members of the factor. Analysis of nomad digital motivation variables in Bali was carried out using 15 valid indicators. Following are the outputs of the tests conducted using the IBM SPSS version 25 program.

Findings

Table 3 shows the demographic characteristics of the 150 samples treated. The gender section shows a balanced proportion of nomad digital samples between men and women. The age section shows that the majority of digital nomads are in the range of 20-29 at 46% and 30-39 at 33%, while the lowest percentage of age is in those aged 50-59 years. For education levels, 57% of the samples are undergraduate alumni, while the lowest is PhD, 4%. From the digital nomads' occupations, the data shows a fairly high variation with the largest percentage of work, among others 12% who work in travel agency, 11% writer, 11% digital marketing, 10% blogger and 10% social media influencer. While, according to its nationality, the digital nomads are dominated by 21% come from Australia, 11% Germany, 10% France, followed by UK and Malaysia 7% and also 7% from other Europe countries. Furthermore, for monthly income, the majority of 35% claimed that their income ranged between 1,000-2,999 USD and 27% in 3,000-4,999 USD.

From Table 4, it can be seen that the highest ranking for push motivation factors are the opportunity to meet other people (3.68), the second is to find a place that related to my work/project (3.49), followed with to get some inspiration to complete with my project (3.45), while the lowest score is to make money without getting pressured from office work (2.72). On the other hands for pull factor, Bali is international destination and friendly with western culture (fashion, alcoholic drink, and food) (4.32), There are plenty options of accommodation in Bali which fit to my budget (4.16), Bali as a safe place to travel and work individually. Whereas the lowest score is Bali provides 24 hours' restaurants with good internet connection and working space (3.48).

Table 3. Demographic Characteristic of Survey

Variable	Count	%	Variable	Count	%
Gender			Education		
Male	73	49%	Below Degree	14	9%
Female	77	51%	Degree	86	57%
Total	150	100%	Master	44	29%
			PhD	6	4%
			Total	150	100%
Age			Occupation		
Under 20	9	6%	Blogger	15	10%
20-29	69	46%	Vlogger	10	7%
30-39	50	33%	Travel Agency	18	12%
40-49	15	10%	Writer	17	11%
50-59	7	5%	Digital Marketing	16	11%
Total	150	100%	Photographer	14	9%
			Web Content	12	8%
			Developer	15	10%
			Social Media	9	6%
			Influencer	4	3%
			Social Volunteer	5	3%
			Creative	7	5%
			Illustrator	8	5%
			Media	150	100%
			Entrepreneur		
			Business		
			Developer		
			Other		
			Total		
Nationality			Monthly Income (USD)		
Australia	31	21%	Below 999	9	6%
New Zealand	7	5%	1000 - 2999	53	35%
Germany	17	11%	3000 - 4999	41	27%
France	15	10%	5000 - 6999	34	23%
United Kingdom	10	7%	7000 and above	13	9%
Netherland	5	3%	Total	150	100%
Russia	3	2%			
Other Europe	11	7%			
United States	5	3%			
Other America	3	2%			
Singapore	8	5%			
Malaysia	11	7%			
China	5	3%			
South Korea	4	3%			

Japan	3	2%			
India	5	3%			
Other Asia	7	5%			
Total	150	100%			

Table 4. *The Importance Ranking of Push-Pull Motive Factors*

Push Motivation Factors	Means	Pull Factors	Means
The opportunity to meet with other people who have similar interests	3.68	Bali is international destination and friendly with western culture (fashion, alcoholic drink, and food)	4.32
To find a place that related to my work/project	3.49	There are plenty options of accommodation in Bali which fit to my budget	4.16
To get some inspiration to complete my project	3.45	Bali as a safe place to travel and work individually	3.92
To have a local friend	3.36	Bali has good mode of transportation	3.73
Improve relationship with friend or partner	3.35	Bali has popular destination which easily to be accessed	3.69
To seek for business opportunity	2.76	Bali offers calm and comfortable atmosphere to complete a project which require inspiration	3.56
To make money without getting pressured from office work	2.72	Bali provides a good vibe to work digitally	3.52
		Bali provides 24 hours' restaurants with good internet connection and working space	3.48

From the results of the analysis of the 9 factors in the questionnaire, two factors were finally removed; 1) to escape from daily life; 2) to experience life which different from my origin culture background because the loading factor is smaller than 0.4. From the remaining factors, factor analysis showed that the KMO value was 0.804. This value ranges from 0.8-0.9 so it is categorized as meritorious. Bartlett's test value is 393,618 with a significance level under 0.05. This value indicates that there is a correlation between variables and is feasible for further processing. By using principal component analysis, two factors were

formed, namely work-related matters and enlarging network which contributed 50,535% and 14.302% respectively (Table 5).

Table 5. *Travel Push Factor Motivation Factor Analysis of Digital Nomad Tourist*

Push Factors	Factor Loading	Common factor variance	Eigen-value	Contribution rate%	Reliability coefficient
Common Factor 1 Work Related Matters			3.537	50.5%	0.825
To find a place that related to my work/project	0.618	0.620			
Improve relationship with partner	0.631	0.501			
To seeks for business opportunity	0.810	0.699			
To make money without getting pressured from office work	0.738	0.647			
To get some inspiration to complete my project	0.825	0.693			
Common Factor 2 Enlarging Network			1.001	14.3%	0.508
The opportunity to meet with other people who have similar interests	0.869	0.754			
To have a local friend	0.644	0.625			

Cumulative variance contribution rate 64.837%; KMO value 0.804; Bartlett ball test, approx. Chi-Square 393.618, Degree of Freedom = 21, Sig=0.000; Cronbach's Alpha=0.674.

Table 6. Travel Pull Factor Motivation Factor Analysis of Digital Nomad Tourist

Pull Factors	Factor Loading	Common factor variance	Eigen-value	Contribution rate%	Reliability coefficient
Common Factor 1 Inspiring Destination			2.440	30.5	0.674
Bali has popular destinations which easily to be accessed	0.515	0.323			
Bali provides a good vibe to work digitally	0.859	0.805			
Bali offers calm and comfortable atmosphere to complete a project which require inspiration	0.873	0.777			
Common Factor 2 Supportive Places to stay and work			1.486	18.5	0.483
Bali provides 24 hours' restaurants with good internet connection and working space	0.469	0.409			
Bali is a safe place to travel and work individually	0.794	0.693			
There are plenty options of accommodation in Bali which fit to my budget	0.749	0.705			
Common Factor 3 Enjoyable activities			1.170	14.6	0.661
Bali has good mode of transportation	0.814	0.693			
Bali is international destination and friendly with western culture (fashion, alcoholic drink, food)	0.805	0.691			

Cumulative variance contribution rate 63.695%; KMO value 0.619; Bartlett ball test, approx. Chi-Square 236.625, Degree of Freedom = 28, Sig=0.000; Cronbach's Alpha=0.655

From the results of an analysis of 10 factors, it was decided to issue 2 factors namely Balinese are recognized as LGBT friendly society and Bali is economist destination for digital nomad because the loading factor is smaller than 0.4. From

the remaining factors, a factor analysis showed that the KMO value was 0.619. This value ranges from 0.6-0.7 so it is classified as mediocre. Bartlett's test value is 236.625 with a significance level under 0.05. This value indicates that there is a correlation between variables and is feasible for further processing. By using principal component analysis, three factors were formed, namely inspiring destination (30.5%), Supportive place to stay and work (18.5%) and enjoyable activities (14.6%) (Table 6).

Conclusion

From the factor analysis, it is concluded that the digital motivation of nomad tourists coming to a destination has two common push factors namely working related material and enlarging network. While there are three common pull factors that attract digital nomad tourists to come, namely inspiring destinations, supporting places to stay and work and enjoyable activities. This conclusion reinforces the fact that digital nomads come to a destination with motivation in relation to work and cannot be separated also expand the network of both local people and those who have the same interests. Whereas in terms of supply, destination managers are advised to further develop various digital nomad facilities and prepare ambience that supports destinations to become a friendly and inspiring destination for digital nomads. In relation to the tourism industry which is aggressively promoted by the Indonesian government, this finding is expected to enrich the data and information on the nomad digital market. With extracted data into information, especially in terms of nomad digital motivation, it is expected that the Indonesian government can further strengthen market analysis of the nomad's digital characteristics so it is able to develop new specific strategies that suits the wants and needs of this market.

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From Looking Good to Doing Good: Necessary Tools to Develop Tourism Industry in Ethiopia

By Tesfaye Fentaw Nigatu*

Tourism needs a successful holistic business approach for its development and governance. The development of tourism greatly determined by making and unmaking of destination attractiveness, providing unique touristic atmosphere, increasing the spending power of visitors through value adding and creation of different innovative tools. African countries' including Ethiopia is not competitive enough as a best touristic destination due to inability to penetrate in the market with their competitive advantages in micro and macro market environments. To respond to these changes customer needs an innovative and transformative or value adding issues needed to transform the tourism industry. Therefore, the concern of this short essay is identifying the innovative and value adding issues to transform Ethiopian tourism. Qualitative research method was used. The majority of the data was a secondary data. Personal observation/self-report and interview were used. The researcher singled out 7 innovative ideas or value adding issues identified and describe to transform Ethiopian tourism in the right direction. These tools were state branding and image building through unmagnified histories of the country, positioning image builders in different countries of the world (especially in the countries were international organizations found and potential tourism customers originate), certification/awarding of tourists by developing an appreciation certificate to visit us through the incorporation of unique feature of Ethiopian terms/ slogans. Developing activity tourism, understanding the use of heritage interpretation to the visitors (as a changing tool of visitors attitude, considers visitors preference and needs rigorous planning), working on Halal tourism and E-marketing development were also identified and described how they are used as an innovative instruments for the transformation of Ethiopian tourism.

Keywords: *Ethiopian tourism, activity tourism, Halal tourism, tourist certification, heritage interpretation, e-marketing*

Introduction

Since the end of World War II global tourism has been increasing. Because of this unreturned growth of tourism industry considered as a globally competitive industry (Küçükaltan and Pirnar 2016). Tourism comprises the activities of persons travelling to and staying in a place outside their usual permanent place of residence for not more than one consecutive year for leisure, business and other purposes (UNWTO 2015). Due to this, it is becoming increasingly sophisticated as evidenced by the varied segments and products that comprise the industry. The common objective of both government and industry is to meet the needs and exceed the expectations of visitors through market driven tourism development in

*Assistant Professor, Department of Tourism and Hotel Management, Wollo University, Ethiopia.

any destination. The tourism industry must respond to the changing wants and needs of consumers and stakeholders, and operators must be responsive to trends (Alberta Tourism, Parks and Recreation Branch 1991).

In the tourism development model, it strongly needs successful holistic business approach to development and governance. The development of tourism greatly determined by making and unmaking of destination attractiveness, providing unique touristic atmosphere, increasing the spending power of visitors through value adding, creation of different innovative tools and many others. African continent is not competitive enough as a best touristic destination due to inability to penetrate in the market with their competitive advantages in micro and macro market environments (Balan et al. 2009, Kotler et al. 2006).

Ethiopia is considered as microcosm of all that Africa has to offer. It holds all combinations of peerless geological formations varying from the lowest (116 meters) below sea level at Danakil depression in the Afar region and the highest peaks rise to 4,520 meters at Ras Dejen in the ruggedly carved Simien Mountains (Gorden and Carrilet 2003, World Bank 2006). Due to its varying culture, languages, way of lives and other cultural identifiers, Ethiopia is considered as the mosaic of peoples. Each part of the country endowed with diverse tourism resources which are significant for the local community, the visitors and the country in general (Mitchell and Coles 2009). Even the varied tourism resources possessed but still the growth and the contribution of tourism for the development of the local livelihood was/is low as compared to the resources and neighboring countries. This may be the lack of marketing, promotion, understanding the need of the customers, positioning and segmenting the tourism resources in a better position and many other reasons. To respond these changes of customer needs an innovative, market lead and value adding issues to address the customers' preferences and in turn to transform the tourism industry. Therefore, the concern of this short essay is identifying the best, innovative and value adding issues to led the tourism development of Ethiopia in the good track.

Methodology

For the accomplishment of this study the researcher used qualitative research method. The data have been collected from majorly secondary sources. However, primary data have been also used from researcher personal observation and informal discussion.

Secondary Data

Secondary data were coming from many sources such as, large government-funded datasets, university/college records, and journal supplements, author's websites, available for a seemingly unlimited number of subject areas, direct (e.g., biomarker data) and indirect observation (e.g., self-report) (Vartanian 2011). By its nature secondary data analysis is a flexible approach and can be utilized in several ways, it is also an empirical exercise with procedural and evaluative steps, just as

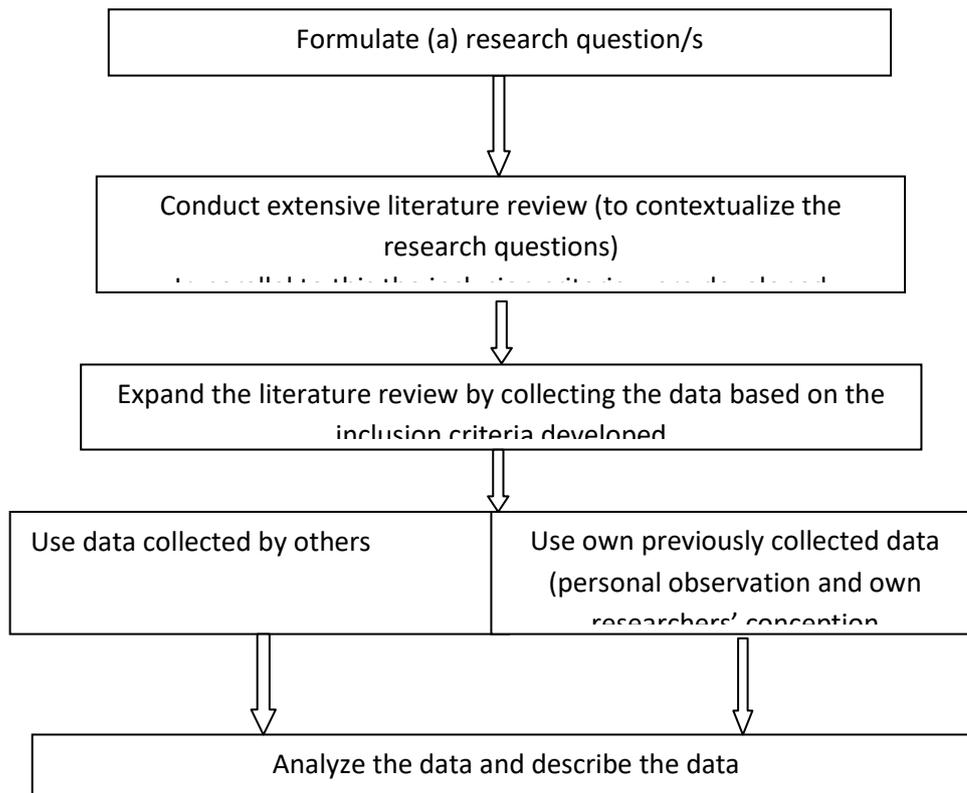
there are in collecting and evaluating primary data (Doolan and Froelicher 2009). Secondary analysis is a systematic method with procedural and evaluative steps, yet there is a lack of literature to define a specific process, therefore this paper proposes a process that begins with the development of the research questions, then the identification of the dataset, and thorough evaluation of the dataset. Therefore, the researcher follows its scientific procedure of secondary data analyses technique. The first step is developing the research question. The researcher develops the research question by applying theoretical knowledge and conceptual skills. The guiding question of this study is what the innovative/transformational tools to change Ethiopian tourism and how these tools were significant for Ethiopian tourism by conceptualizing them in the Ethiopian context. The second step is identifying the dataset. Most of the time, research begins with an investigation to learn what is already known and what remains to be learned about a topic (Creswell 2009); including related and supporting literature, but one should also consider previously collected data on the topic (Doolan and Froelicher 2009). In the case of this research an in-depth literature review of the areas of interest was conducted examining the previous and current work of experts in the field in the field of tourism, hospitality and travel studies. Thirdly, after identifying the data set, the researcher evaluates the dataset. Evaluation of data set is significant for the researcher in order to understand the appropriateness and quality in advance of actual use.

The secondary data process presented below in Figure 1 for this research work.

Personal Observation

For this research, the researcher used unstructured or naturalistic observation method. Unstructured observation has no formal rules established and no formalized recording or analysis procedures. The observer seeks to describe the phenomenon of interest and develop explanations and understandings in the process (Veal 2011). The researcher experienced in visiting many tourism destinations of Ethiopia. These destinations were Lalibela, Aksum, Gondar castles and churches, Semien mountain national park, Bahir Dar natural sites and its monasteries, Jima Aba Jifar heritage site, Harar Jegol historic town, most of the museums in Addis Ababa, Tiya, Borena National park in Oromia, historic monastery of Haik, Wuchale yisma negus and some other area specific destination of tourism in Ethiopia. During this field visit the researcher tried to observe what happened especially in the interpretation of heritage resources for the visitors. On the other hand, the researcher also tried to think how to develop and how to use the best opportunities for the tourism transformation while in this naturalistic observation.

Figure 1. The Flow Chart of Secondary Data Collection and Analysis Used for this Study



Data Analysis and Interpretation

State Branding and Image Building

For a long period of time, Ethiopia is considered as a contested nation with poor image which creates an obstacle for the international tourist arrival. This view dominantly reflected by the western world. Especially the negative image was escalated in the international arena since and around 1974 revolution. For the westerners Ethiopia was widely known with famine. *“The negative image of Ethiopia as a country of poverty, starvation, drought and floods is one of the main impediments to promoting Ethiopia as a tourism destination and therefore, image strategy will play a crucial role for the industry”* (Japanese Embassy in Ethiopia 2007).

Since then, the media come across this negative image and distribute to the international media and their own ways. Therefore, the long history and the image were diminished with a short period of time and with few minutes' news and media coverage. The Ethiopia government also understood the negative perception of Ethiopia on the international media. To change this perception the government established two organs, the Tourism Transformation Counsel and the Ethiopian Tourism Organization. The former provides leadership and set guidelines for the

country's tourism marketing initiatives while the latter serves as a secretariat for the former. The Ministry of Culture and Tourism has a vision to make Ethiopia one of the top five tourist destinations by 2020 through positive image building of the country. However, these two organs are not as successful due to different administrative, political and social challenges.

As it is known, image building is a sophisticated task and needs more time to build it. Still Ethiopia is entangled with this challenge and misses how to build image and change the mind of Westerns. The two organs also did not perform well. And they did not work on how to build image of tourism and brand the state. They mostly concentrated on the recent development agendas for tourism transformation. However, the sense of image building and state branding is going back in the past and history of the country. Because branding and image building is just part of the need for a wider appreciation of greater creativity across the whole spectrum of marketing activity. Branding on the other hand developed outside the mass of commodity and needs brand innovation in the destination sector as compared to other sectors within the tourism industry (Freire 2004, Konecnik 2004, Morgan et al. 2002).

On the other hand, the country image is also not only the narration of current economic development and speak about the government triumph; it IS rather about the leadership, history, economic situation, stability, its heritages, determination of the people for believe and the social life of the world and many others. Many countries of the world invest much time and effort in order to improve their image through the use of different techniques like advertising, public relations, direct mailing/marketing and sales promotion (Glazer 2011). Here, the researcher wants to forward how to build image through history in Ethiopian context and indicate how to use historical phenomena's as a successful and reliable image builder tool.

Image Building through Unmagnified Histories of the Country

Ethiopia is marked as heterogeneity of the polity without bewildering variation in the important pattern of history. The pattern of its history is unmagnified and appreciated from its origin in practice. The political arena in the last few years with collision-collusion syndrome and reconciling the common denominators for mutual interests and complementarily affinities creates confusion. However, the history of state and state formation in the organized ways traced back to before the birth of Jesus Christ with the formation of Aksumite State in the North Ethiopia (Ezozo 2009). Ethiopians have a smart history since the ancient time and known by as the pioneer of black African decolonization movement on the land of Africa. They also pass a lot of ups and down through different time and regime (Zewde 2002). But they cannot magnify the smart history for the larger audience for tourism development as an image building tool.

The Ethiopian land was very vast during the ancient time. Its land is also known in different name. These names are; "Land of punt", "Southern land", "Land of Kush", "Land of Yenehese" (this name was given due to the 5th son of Kame or Nehese means black; therefore, they may say the land of black). As of indicated by Mekuria (1963), Ethiopian civilization was far longest than Egyptians.

Ethiopia is the center of great civilization in the east Africa. Ethiopia was/is situated in the favorable geographical position near the Red Sea and the sources of Blue Nile for the real evidence of great civilization emerged. Beyond its great civilization center, Ethiopia has an outstanding external relation with the great power during the ancient time especially its relation with South Arabia, Greco-Roman World, Israel, and Libya.

The relation of Ancient Ethiopia with the Hellenic peoples and the Mediterranean world has also a historical significance for the current image of Ethiopia. Once time in history the whole continent of Africa known in the name of Ethiopia and Libya. Greek literatures describe Ethiopia in different times especially in the work of Homer. He mentioned two times in Iliad and three times in Odyssey. Greek philosophers and historians wrote about Ethiopia in their literature and philosophical books especially Herodotus (who lived and travelled throughout the Middle East and Egypt, he heard and wrote about Ethiopian history and its culture). These and many other literatures testify that the long history of Ethiopia (Buxton, 1947, Sellassie 1972).

The diplomatic, economic and social relation with South Arabia was a pinnacle of the period. The two sovereign countries were strong religious relations with the movement of Prophet Mohammed and his families. Due to the fraternity relation and the good welcome of the Mohammed's family to Ethiopia; the guests appreciate the hospitality of Ethiopians by saying and currently it may use for the image and touristic information in Ethiopia targeted to the Middle East. Due to these and other political, social and economic interrelations with outside world, Ethiopia was the third great power next to Persia and Rome. Therefore, these and many others rich histories of Ethiopia give power for the image building process of Ethiopia and preach address and promote all these historical phenomena.

Positioning Image Builders in Different Countries

The other innovative tool is putting image builders in different potential and actual great powers for tourism development in Ethiopia. It is better to arrange facilities and necessary things for this issue. It is the right time to put image builders in Latin America, America, Canada, Europe, and Asian countries by opening an office in their major cities working for the purpose of tourism development. It is also a wise choice to open an office in Spain Madrid in the name of Ethiopia and its tourism development working with United Nation World Tourism Organization (UNWTO 2015).

Certification of Tourists/Recognition/Awarding

The researcher believed that tourism transformation by adding values for the customers who are coming from different corners of the world is a good way. Simply, this concept is related with giving a written attractive, informative and clear certificate to the tourist to promote the image of the country. May be the word is like "we give this certificate for your visit our country, Ethiopia; land of origin, the home land of coffee Arabica, the land of extreme points..." from the

country level. From specific destination point of views Ethiopia develop touristic destination image and certificate. For example, it is possible to certify the tourists who visit Lalibela by incorporating the energetic and unique words for Lalibela “8th wonder of the world”, “the second Jerusalem”, “unique architectural designed place”... this tools gives many implications for the tourism development and it considered as a double edging sword. For one side, it promotes the image of Ethiopia on the other side it is important for marketing and promotion of Ethiopian tourism attractions. It increases the double, triple and more visitation of Ethiopia by foreign visitors.

Developing Activity Tourism

Conceptually, activity tourism is a type of tourism which defined as a process involving people, as individual or as parts of group, who travel away from home to take part in an active leisure pursuit. Pottery, experiencing traditional cooking workshops, cultural heritage tours, wildlife watching/ conservation...are the types of activity tourism. Developing activity tourism is very important for different stakeholders of the country like for the farmers, for landowners, locals, governments, employees, investors.

Activity tourism is also expressed by allowing and experiencing the local communities culture and products to practice, touch or tactile to the visitors. Almost all the tourism products and activities of Ethiopia are not available and these are significant for stimulating the sense of visitors by touching and experiencing it. Incorporating the sense of touch and experiences for certain product is not a difficult task for marketers and resource owners. This can be achieved through encouraging and giving the opportunity to handle products – rather than putting “Don’t touch Signs”. Modern day tourist’s needs touch and feel the tourism activities in the destination (Pinky and Mridula 2014). For example, it is possible to invest in the replicas of the most interesting and most visited museum collection and encourage the visitors to handle these objects. In Ethiopia all these things are not done. Very few museum collections in Addis Ababa have a replica. Therefore, Ethiopians have to invest more for this best promotion and transformation tool for tourism development.

Ethiopia is a land suitable for activity tourism by developing the products, activities and cultures. By developing activity tourism to create authentic experiences and image to the tourists’ mind Ethiopia should develop tourism in a better position. Ethiopians have to sell natural products like sea foods in by launching sea-side restaurants and allowing the tourists to see, touch and choose their food before goes into the cooking bowls. The tourism providers can organize trip and allow the tourists to practice and involve the visitors in the preparation process to make the whole experience a memorable and unforgettable one for Ethiopian cultural activities like baking of bread and enjera, preparing Tela (local beer) and producing coffee from the beginning up to the end.

The researcher observes different cultural coffee preparation process especially in the Borena and Guji Oromo communities of Ethiopia the tradition is attractive and enjoyable. The local communities call it “Buna Qalla” Ceremony.

Buna Qalla is one of highly practiced traditional drink. It has a great meaning for the local community prepared during different ceremonies and holydays. It may serve as the expression of peace and prosperity. When one observes the preparation of Buna Qalla, it is very attractive and full of blessing by the local elders. It is a mixture of pieces of coffee, milk, oil, sugar, butter and different sweetening items. It has a power to stimulate and sweet. The whole process by involving the visitors is very important to develop activity tourism in Ethiopia in general and local communities in particular.

Figure 2. Preparation of Buna Qalla



Source: Author 2016/17.

As shown in Figure 2, the preparation takes more than an hour and is an enjoyable experience. If we think over to develop activity tourism in this process the tourists enjoy it and elongate the tourists stay and their travel experience is unforgettable and memorable.

Each communities and ethnic groups have developed their own coffee preparation process and it is possible to involve the visitors in this process rather giving the end result of drinking coffee.

In southern Ethiopia “enset” production and preparation is very common and one form of potential resources of tourism to develop an activity tourism in Ethiopia. Developing this potential product as an activity tourism experience the local culture will be promoted, the length of stay of the tourist is elongated; the visitors enjoyed the experience and more active in their travel vacation.

Figure 3 depicts that the tourists involve directly in the practice of pottery making and active in the process. In the sense of tourism, practicing activity tourism has a double sword tool. For one thing, it makes longer the length of stay of the tourists while they are in the destination. Short length of stay of the tourist is the major bottleneck of Ethiopian tourism development. Due to their short stay in Ethiopia, the economic impact of tourism on the national economy is very minimal.

Figure 3. An Example of Activity Tourism where the Tourist Directly Participated in Pottery Making Process

The image shows a screenshot of the Ethiopia Community Tourism website. At the top, there is a logo for Ethiopia Community Tourism with social media icons for Facebook, Instagram, and YouTube. Below the logo is a navigation menu with links: Home, About Ethiopia, Our Tours, Plan Your Trip, Travelers Giving Back, About Us, and Contact Us. A search bar is also present. The main content area features a large photograph of a tourist in a blue jacket and a local woman in traditional attire working together to shape a clay pot on a pottery wheel. A green callout box on the left of the photo says "EXPLORE THE ROOTS OF ETHIOPIA". Below the photo, there is a "Welcome to Ethiopia Community Tourism!" section with a "Travelers Giving Back" icon and a "Videos" section with a play button icon. The "Travelers Giving Back" section includes a "Learn More >" link. The "Videos" section includes a "Watch the unforgettable travel experiences that Ethiopia communities have to offer >" link.

Source: Ethiopian Community Tourism.

Understanding the Use of Heritage Interpretation for the Tourists

Tourism is about experiencing beyond the ordinary (Smith and Robinson 2005). It is to step out of the daily treadmill into a more wonderful, exciting and challenging world. In connection to this a well-known scholar Hughes and Mason stated that the core ideas and practice of tourism product is to 'mystify the mundane, to amplify the exotic, minimize the misery, rationalize the disquietude and romanticize the strange' (Hughes 1995, Mason 1994). On the other side tourism is about selling dreams. These tourism dreams have to be sustained by both the producer of the products and the consumers and the perception of authentic interpretation of heritage resources. Authentic heritage interpretation is a modern sense of describing heritage resources through creativity and originality without any addition and subtraction to raise the interest of the visitors (Smith and Robinson 2005).

Communication practice is born with human kind. Peoples have tried to understand and explain the world around them. Interpretation of heritage is part of tradition of explaining and celebrating the stories through art, writing, dance and oral traditions. Interpretation techniques of heritage describe on what is specific about the site and why it is valued as heritage. The researcher observes different heritage sites of Gondar, Lalibela, Aksum, Tiya, Jimma and different heritage sites in different time for different experiences. On the other side, the researcher visits and observe different museum in the country like Dessie museum, Addis Ababa Institute of Ethiopian Studies museum, National museum of Ethiopia, Bahir Dar museum, Gondar Ras Ginbe museum and most of Lake Tana monasteries museum. However, while researcher was one of the visitors and observe that the interpretation of heritage resources problematic and observe the following major problems.

The first one is the interpreters of heritage did not understand to reveal meanings and relationships of cultural and natural heritage to the visitors. It is better to understand heritage interpretation is a communication process available to any heritage site management to communicate messages and stories about the sites to their visitors and involves activities such as talking and listening, writing and reading, performing and witnessing, or, more generally, doing anything that involves 'messages' in any medium or situation.

Secondly, in some heritage sites and museum collections interpretation, the curators and the wardens lacked the concept of heritage interpretation is a mix of edutainment's (education + entertainments). It is recommended to understand heritage tourists as travel to see, experience and learn about heritage sites, features, objects, people, events and stories and encourage visitors' interest in learning, offer ways to enhance experiences and help visitors to understand a place and culture, and encourage their sustainable and responsible behaviors (Tilden 1977).

The researcher summarizes his finding in the following ways in relation with interpreting heritage resources for the visitors in order to transform the tourism development of Ethiopia. These are:

- A. Interpretation of heritage resources as a tool for changing visitor's attitude:** Through interpretation, heritages encourage visitors' interest in learning, offer ways to enhance experiences, help visitors to understand a place and culture, and encourage their sustainable and responsible behaviors. According to Mossberg and his colleagues work in the last two decades global tourism has created new challenges for heritage sites. Today it is imperative to develop value propositions that create a holistic experience for the visitors. Framed under the term the "experience economy", focus of heritage tourism is moving away from products and tangibles, to concentrate on the processes taking place around visitors. The new role of tourism interpretation is to lead visitors to be actively involved in constructing their own experience through personalized interaction with heritage site (Mossberg et al. 2010). In twenty-first century, tourism interpretation is far more likely to recognize visitor empowerment than to change visitor attitudes and behaviors (Staiff 2014). With the new focus on the processes, interpretation becomes an attitude. It is a new way of thinking about the quality of communication and of services for visitors on heritage sites. It is a dedication to ensure powerful and effective experience in order to provide deeper benefits to individuals and to society. Taking into consideration human desire for meaning and connections to communities and places, interpretation on heritage sites identifies uniqueness of places and cultures and helps people develop a personal and collective sense of being and value (Veverka 2000).
- B. Heritage interpretation needs rigorous planning:** tourism interpretation has to be powerful and effective in "telling our stories"; it needs to be planned and managed with creativity and sensitivity. To be creative, tourism interpretation draws inspiration from other fields such as marketing, journalism, art, branding, retail, and business planning (Griffin 2015). Sensitivity on the other hand is gained, when tourism interpretation reflects the understanding that it is not produced by managers and operators of heritage sites, but rather co-created with the visitors. It is better to start with the following basic question while we to plan our heritage interpretation. These questions are the following one developed by Colquhoun (2005).
- ✓ Why interpret certain heritage topic or site to tourists?
 - ✓ What is to be interpreted?
 - ✓ Who are the audience/segments?
 - ✓ Who should be involved in the interpretation process?
 - ✓ What is interesting in our story, topic and theme?
 - ✓ What are the objectives of interpretation on heritage site?
 - ✓ How will the money allocated for interpretation are spent?
 - ✓ Which interpretation techniques will be used? (Colquhoun 2005)
- C. Heritage interpretation considers the needs and wants of visitor's preference:** All over the world, every day, millions of visitors visit heritage sites and have different preferences. Interpretation techniques should also

consider needs of specific types of audience, such as visitors with special needs and children. In Ethiopia we are not on the right way of working towards the preference of the visitors as far as researcher observes the heritage sites. It is better to incorporate the special needy and Childers in our interpretation process. When tailoring interpretation for people with mobility limitations, visual or auditory impairments we have to develop multi-sensory experiences, guided activities, an audio option, listening post, or panel with sound, clearly structured text with big headings, large print brochures, and special color combinations, special maps, models, replicas for touching, appropriate heights and lights and steps to give better viewing. Interpretation for children requires completely different didactic approach than that for adults. Interpretation techniques for children should follow the stages of child development with following example: 0-2 years – color, sound, touch, repetition; 2-7 years – play, repeat, identify and match things, experience real things; 7-11 years – creating own meanings, exploration, discover, fine motor co-ordination and over 11 years more complex problem solving, participatory activities, discovery and exploration (Ham 2013).

Working on Halal Tourism Development

Halal tourism is special segment of tourism. Halal tourism is defined as a tourism activity that operated under Islamic law in terms of behavior, dressing, conduct and food items. On the other hand, it also refers to tourism products that provide hospitality services in accordance with Islamic beliefs and practices (Shafae and Mohamed 2015). This involves serving Halal food, having separate swimming pools; spa and leisure activities for men and women, alcohol free dining areas, prayer facilities, and even women-only beach areas with Islamic swimming pool. Globally, Islamic travelers are increasing in alarming rate. According to the UNESCO forecasts 69 million (by 2020) Middle Eastern tourists with annual growth rate of 6.7% (the highest among other regions) basically it seems small but what matters is the Middle Eastern visitors are often affluent and are big spenders. Just as a world growing niche tourism market developing Halal tourism in Ethiopia is the most significant one. As of indicated by Ahmed and Akbaba (2018) in their interesting article entitled with “the potential of Halal tourism in Ethiopia: opportunities, challenges and prospects, Ethiopia is truly the best place to practice Halal tourism through different reasons. The major reason were its geopolitical position, the place where the first Hijira travel conducted, the large population of Muslim communities (around half of the population), and the growing interest of Muslim world communities to invest Ethiopia. Many countries in the world invest on Halal tourism. The first country is Malaysia as the friendliest Halal destination for Muslim tourists (Rahman 2014). The country earns 21 billion US\$ in the fiscal year of 2013 and plan to earn 50 Billion US\$ by 2020. Singapore, Indonesia, United Arab Emirates, Turkey, Saud Arabia, Qatar, Morocco, Oman, Bahrain and Iran able to get a significant share of Halal tourism from the world major share by invest on it. By considering the best opportunities

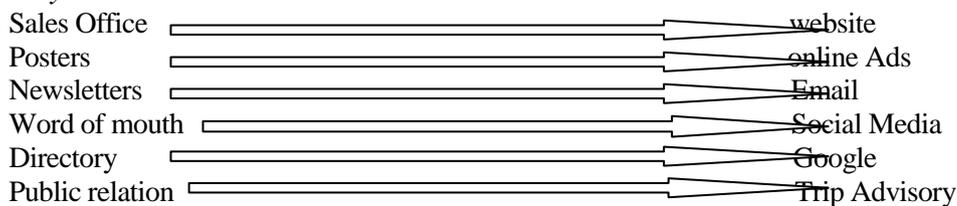
what Ethiopia possess it is hey time to operate Halal tourism in Ethiopia to enjoy the crème cake of tourism.

Going to on Modern Communication Tool Rather than Traditional Marketing

Thanks to the advent of information communication technology (ICT) since the 1990s the communication pattern changed substantially. ICT supported tourism and travel industry and facilitate communication among different stakeholders by simplifying different works of training, security, reservation, revenue management, marketing, guest services and strategic and operational management (Buhalis and Law 2008, Ip et al. 2011).

E-marketing is the main part of marketing tool through internet and web design development. Due to this development, the traditional marketing is changed in to modern marketing sense (Brodie et al. 2007). This paradigm shift of marketing tools and consumer's preference is shown in Figure 4.

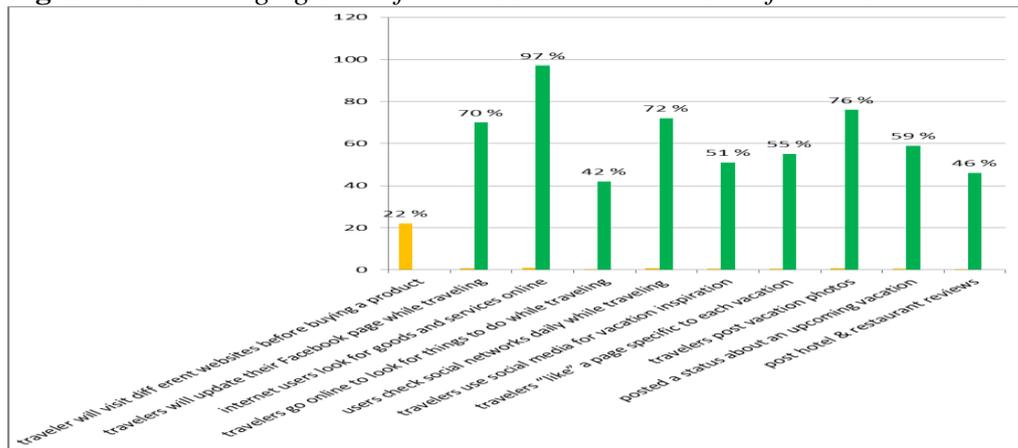
Figure 4. *The Shift Marketing Tools and Consumers Preferences from Old to New Ways*



Source: Ethiopia: Sustainable Tourism Development Project (2019).

As clearly indicated in Figure 4, the old form of marketing tools changes to the new tools. These were sales office promotion changed in to website promotion. The marketers change their strategy from the sales office in to website development for their marketing practice. The same is true poster promotion and newsletters were changed in to online ads and email promotion respectively. Social Medias, Google and trip advisory replaced the old marketing tools of word of mouth, directory and public relation respectively in the tourism and travel industry.

Due to the development of internet and ICT, social Medias are developed as a success full marketing tool. Social Medias play a decisive role in tourism marketing because social medias and technologies make possible content sharing like text, video, images and etc.), social networking, like Facebook, social book marking like rating and tagging, collaborative writing like wikis and many others (Dawson 2007, Pantano et al. 2010). The changing role of social media and their role for the travelers are expressed in Figure 5.

Figure 5. *The Changing Role of Social Media and their Role for the Travelers*

Source: Ethiopia: Sustainable Tourism Development Project (2019).

The roles of social media in the travel market and its impact on the tourism industry are shown in Figure 5. As understood from the figure, 97% of the internet user travelers in the 21st century look online to buy and use services and goods. 76% of the travelers post their photos after their vacation and 71% check their social networks daily while they are in traveling respectively. Around 70% of travels of the 21st update their face book page while they are travelling. 59% posted a status about an upcoming vacation and 46% post hotel & restaurant reviews they have stayed and wish to stay. On the other hand 40% post attraction reviews. The changing face of social media gives lessons for the promotion of the country in the online promotional tools because the majority of the travelers uses online promotional tools as a means of getting information for their products and services.

Conclusion

The Ethiopian government aware that Tourism is one sector that is essential to economic growth. In order to make it a reality different mechanism should be implemented and practiced. In this research the researcher found that the following tools were very significant for the Ethiopian tourism development. The first one is state branding and image building through the country's unique identifiers like the countries long lasting history to change the negative perception of the world population towards Ethiopia and by positioning image builders in different parts of the world to preach and magnify the resources and histories of the country. Certifying or awarding the visited travelers of Ethiopia to make unique and to satisfy the guests, developing activity tourism to make the tourism activity is active participatory and edutainment were also a tool to make Ethiopian tourism activity vibrant. Understanding Heritage interpretation as a changing tool of visitors' attitude, developing Halal tourism and understanding the paradigm shift from traditional marketing to internet-based marketing (e-marketing) were also very essential tools to develop Ethiopian tourism. The research finding greatly gives an implication for the transformation of tourism development in Ethiopia by developing a transformative and value adding tools. These tools will also a direct

implication for other countries and similar tourism destination of the world to develop tourism in their own territory if they will practice.

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