

Theme: Domestic & Global

# **Tourism Strategies and Opportunities in Kenya and Ethiopia - A Case Approach**

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## **INTRODUCTION**

During the past few decades, tourism has emerged as one of the world's major industries, exceeding the importance of many manufacturing industries and other services in terms of sales, employment and foreign earnings. Tourism contributors to Sub-Saharan African countries suggests that the industry's role is very significant. In Kenya, for example, the tourism industry has rapidly become of central importance to the country's economic health. However, the results are far from uniform. There is considerable disparity when considering tourist receipts as a percentage of GDP when a range of Sub-Saharan African countries are considered.

A number of less developed countries that are endowed with abundant tourist attractions fail to capitalise on those resources in order to improve their export earnings capabilities. Lack of strategic objectives has been a drawback in some countries. Others suffer from negative perceptions of their destinations due mainly to unstable political situations, lack of security or poor facilities.

This study is concerned with tourist development in the context of less developed countries with a specific focus on Kenya and Ethiopia.

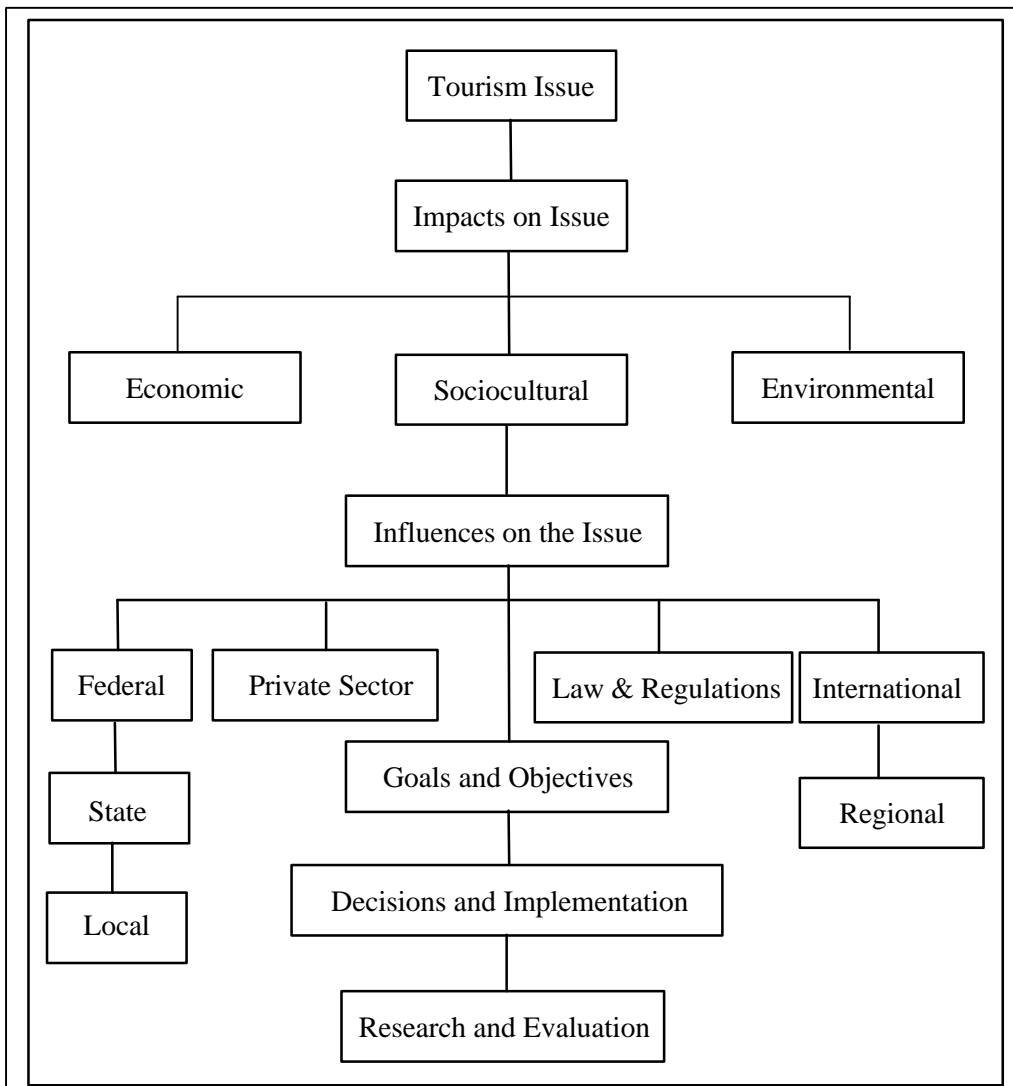
## **TOURISM POLICIES**

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

tourism'. Phase three is a blend of 'hard' and 'soft' tourism and in this phase the public sector actively encourages the private sector to invest in tourism.

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

**Figure 1**  
**Tourism Policy Issues**



A tourism strategy should establish a basic framework of physical facilities: recreational land, resort complexes, resort communities - major attractions, and tourist travelways as well as supportive programs such as environment, promotion, planning, training, and tourist information. Culpan (1987) has indicated that the major strategies included a mass-marketing approach for the public through tourism intermediaries, and a focused strategy requiring careful analysis of the target market and its needs for unique services.

In general, developing countries are subject to widely differing economic, social and political circumstances and have different goals and priorities (Sinclair 1991). Although no universal set of policy prescriptions is appropriate for all countries, the need to take account of different forms of intervention by foreign participants, during the process of policy formulation, is common to all tourist destinations.

### **KENYA'S APPROACH**

Tourism is the number one foreign exchange earner for Kenya ahead of coffee and tea. It has been on the rise for over a decade but recent developments in the world and events at home have put doubts on the future success of this buoyant sector (Dine 1992; Harrison 1992). Although tourism is clearly important to the Kenyan economy, both in direct effects upon employment, incomes and the balance of payments, and indirectly as a means of stimulating secondary demand in other sectors of the economy, Kenya illustrates some of the potentially negative effects of tourism on developing countries. The problems of tourism development in Kenya are identified as follows: (a) rapid growth and uncontrolled development; (b) impact of recession and oil crises; (c) seasonality; (d) political instability, and (e) complex land-use patterns (Richards 1991; Godfrey 1991; Teye 1987, 1988(b), Ambrose 1991). Kenya's policy objective in maximising tourist arrivals, has brought with it considerable problems: (a) congestion at the game parks and reserves and the danger of the destruction of the ecosystem; (b) conflicts with competing demand from other sectors of the economy, or with community interests in general; (c) a lack of promotion, training and maintenance of facilities, and (d) the nature of the global economy and keen competition in the tourist market. Kenya's social structure, culture crafts and development strategies could all be negatively affected by international tourism. The possibility exists that wage rates could be distorted, that unbalanced consumption patterns could be encouraged by the presence of large numbers of prosperous foreign visitors, and that a second rate, "manufactured" African culture could be generated in order to entertain foreign tourists which could eclipse more deeply rooted cultures. These are the risks which Kenya has to balance in determining how best to develop its tourism sector. The only way this could be achieved is by the formulation of a comprehensive government centered tourism strategy, which would itself derive from the government's growth strategy.

An example of the lack of a comprehensive strategic approach is provided by the following example. In Kenya's Tsavo Park - a huge national wildlife park, developers unwittingly created a major environmental problem. They built an artificial waterhole near the Kilguni Lodge. The intention was simple - it would enable the hotel guests to watch the animals come to drink. The environmental effects were unanticipated. The country for kilometers around the waterhole, once covered in lush green vegetation, became a flattened brown patch of erosion. The animals saw no need to follow the seasonal rains across the parks they just remained around the hole that miraculously never dried up, until they wore the country out! (Dickman, 1997).

### **Kenya - Policy Orientation**

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

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

Kenya's tourism development objectives were to increase tourism's contribution to the growth of Gross Domestic Product; raise the foreign exchange earning capacity; create more employment opportunities; increase Kenyan ownership and management of the industry; reduce any undesirable social or environmental consequences; and conserve, protect and improve environment and wildlife. The master plan focused on two programs. The first program involved developing

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

Kenya has harnessed its resources to attract a more influential type of tourist. This has been prompted, in part, by the relative decline of Nairobi as a tourist destination and the under-use of its high class accommodation. Employment in the sector generates 9.0 percent of the total employment in Kenya with an estimated 106,500 persons directly and indirectly employed in tourism in 1987 with projections of 110,600 in 1988 (Dieke 1991). Over time there have been attacks on tourists such as that of the Masai Mara case along with sporadic politically motivated attacks (Forrester, 1992). A more recent occurrence is the continuing political violence in and around Mombassa in 1997, resulting in huge numbers of holiday cancellations (Davies, D. 1998). Since that time, the bombings in Nairobi have extended tourists apprehension (Economist, 1998). In addition the geographic distribution of Kenya's two main tourist attractions, wildlife safaris and beach holidays has resulted in minimal stopovers in Nairobi itself.

### **Kenyas Tourist Markets**

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

Although often thought of in Europe as a winter sun destination, Kenya is having increasing success in promoting itself as a year-round destination. Germany has

traditionally been a prime source of visitors. Some 100,000 German tourists visit Kenya each year, the vast majority of whom visit Kenya for holidays. Other important European markets are Italy, Switzerland and Scandinavia. North American visitors are predominantly from the USA, although significant increases to Canadian arrivals are now being experienced. These destinations are the focus of tourism promotional campaigns. Sixty percent of Kenyan visitors are from Europe, with another 12 percent from North America (Harrison 1992). The industry is now intensifying efforts to expand this base to tap the Far Eastern markets.

### **KENYA - ETHIOPIA: A COMPARISON**

A comparison between the Ethiopian and Kenyan governments expenditures shows that in 1994, Ethiopia allocated 41 percent of its recurrent budget to national defence, whilst Kenya allocated only 10 percent. The vast discrepancy in terms of tourist arrivals, receipts and expenditures is shown in Table 1.

**Table 1**  
**Tourist Arrivals, Receipts and Expenditures - Ethiopia and Kenya**

		1990	1991	1992	1993	1994	1995	% Change 1995- 1991
Ethiopia	Arrivals ('000)	79	82	83	93	98	102	29
	Receipts (US\$m)	26	20	23	20	23	36	38
	Expenditures (US\$m)	11	7	10	11	9	25	127
Kenya	Arrivals ('000)	814	805	782	826	863	691	(15)
	Receipts (US\$m)	466	432	442	413	505	454	(3)
	Expenditures (US\$m)	38	24	29	48	115	135	25.5

Sources: The United Nations (1996) World Tourism Organisation (1997)

This distinction is further emphasised when one considers the accommodation available in the two countries. Details are shown in Table 2.

**Table 2**  
**Ethiopia and Kenya - Accommodation (Hotels and Similar Establishments)**

		1991	1992	1993	1994	1995	% Change 1995- 1991
Ethiopia	No. of Rooms	2,783	2,661	3,218	3,440	3,899	40
	No. of Bed-places	4,931	4,564	5,350	5,500	5,907	20
	Occupancy Rate (%)	n.a.	n.a.	37	62	58	57
Kenya	No. of Rooms	n.a.	17,000	18,000	18,888	18,000	6
	No. of Bed-places	24,466	34,211	34,211	34,211	34,211	29
	Occupancy Rate (%)	59	48	52	43	44	(25)

Source: World Tourism Organisation (1997)

Ethiopia, located on the Horn of Africa, borders on Sudan in the west, Kenya in the south, Somalia and the Republic of Djibouti in the east and Eritrea in the north. Ethiopia with its impressive array of fauna and historical sights should represent a logical tourist haven. The country's best and principal tourist attractions, the ones on the Historic Route include Axum, Lalibela, Gunder, Blue Nile (Tisisat) Falls and Bahir Dar. Ethiopia has a total of 37000sqkm of national parks, game reserves and sanctuaries. These are home to some of the big game animals of which twenty one species of endemic animals and several subspecies are found only in Ethiopia.

Kenya represents a useful benchmark. This southerly neighbour is acknowledged as a major African tourism destination. In part this is due to the wide range of game associated with the Rift Valley. The Rift Valley extends into the south western regions of Ethiopia. A comparison of major attractions in the two countries is shown in Table 3.

## **HISTORICAL ETHIOPIA**

Ethiopia, the land of the Queen of Sheba, the birthplace of the Blue Nile, is regarded as the "cradle of mankind". That Ethiopia has a heritage from the beginnings of mankind was underlined when the remains of 'Lucy' dated from 3.5 million years ago, and the 4.4 million year old *Homo ramidus afarenis*, man's oldest anthropoid ancestor, were uncovered. Traders from Greece, Rome, Persia



and Egypt knew of the riches of what is now Ethiopia, and by the first century AD, Axum was the capital of a great empire. This realm became one of the first Christian lands of Africa. Late in the 10<sup>th</sup> century Axum declined and a new Zagwe dynasty, centred in what is now Lalibela, ruled the land. Axum, Lalibella and Gondar now provides the country's greatest historical legacy. It was in the 16<sup>th</sup> century that the son of the great explorer Vasco da Gama went to Ethiopia, but then found a land of many kingdoms and provinces beset by feuds and wars. In the 19<sup>th</sup> century the great Emperor Menelik led the people towards the modern state of Ethiopia, and the Country's passage to modernisation began (Ethiopian Tourism Commission 1994).

A country with one of the richest histories on the African continent, Ethiopia has a wealth of castles, palaces, and ancient churches and monasteries - as well as unique wildlife, bird life, and breathtaking vistas. For Ethiopia is a land of extremes, a land of remote and wild places. Some of the highest, most rugged and inaccessible places on the African continent are found here, such as the jaggedly carved Simien Mountains, offering landscapes reminiscent of America's Grand Canyon and some of the lowest, such as the forbidding but fascinating Danakil Depression.

Ethiopia is a land of big skies and broad landscapes. In the highlands, the plateau reaches endlessly to a horizon that blends into blue sky speckled with white cumulus clouds, a sky that is an integral part of the landscape. The whole expansive view breathes of the freedom and joy that goes along with open spaces (Camerapix 1995).

It is this history which clearly distinguishes Ethiopia from other African tourist destinations. These elements are reflected in Table 3. Ethiopia has all the attributes of Kenya in terms of safari and wild life tourism - and more!

The question is why has Ethiopia not capitalised on what is unquestionably a treasure trove of tourist attractions?

Ethiopia's image as a preferred tourist destination has declined since the 1974 revolution. This has been due in part to natural phenomena such as droughts. A major contributory cause can be traced to political and ideological expediencies of the military government that took power by overthrowing Emperor Haile Selassie I in September 1974. In addition, the civil war in the north of the country, particularly in Eritrea and Tigray, resulted in a drain on the nation's scarce resources. In addition to these factors, one should not dismiss as irrelevant the role of the government. Budgetary deficiency is one area where governments' priorities are reflected. In under-developed countries a two-fold problem exists. First, the government's tax revenues are not high because of low per capita income of the general population. Second, most of the government revenue is needed to provide basic social services, leaving little for tourism development. This is particularly true of the Ethiopian situation.

## Ethiopia's Tourism Development

Countries embarking on tourism development programs usually cannot afford to do everything at once. They must, of necessity select certain areas for development. Instinctively, they will choose areas where an infrastructure already exists. Tourism potential, however, is often related to peripheral, remote and economically underdeveloped areas.

**Table 3**  
**Comparison of Major Attractions**

Kenya - Tourist Attractions	Ethiopia - Tourist Attractions
National parks	The Historic Route
Game reserves	Bahar Dar/Blue Nile Falls
Culture	Lake Tana
Beaches	Gondar
Fishing/angling	Simien Mountains National Park
Wild animals	Axum
Scenery	Makale
Water sports	Lalibela
Climate	The North-East
Coral reefs	Awash National Park
Safaris (short and long)	Yangudi-Rassa National Park
City tours	The East
Balloon trips (e.g., Maasai Mara)	Dire Dawa
Marine park/reserve	Harar
Animal orphanage	The South-East
Walking	Bale Mountains National Park
Farms (crocodile, etc)	Sof Omar Caves
Tea estates	The Rift Valley
Bird watching	Abitatta-Shalia Lakes National Park
Fishing	Nechisar National Park
Dhow tours	Awasa
Racecourse	Senkele Sanctuary
Archaeological sites	Lakes Abaya and Chamo
Historical ruins and museums	Arba Minch
Traditional dancing	Yabello Sanctuary
Curio markets	Jinka
	Mago National Park
	Omo National Park
	The West
	Addis Alem
	Gambelia National Park
	Jimma
	The Capital
	Addis Ababa

Sources: (1) Sagaye, T.S. (1996); (2) Sindiga, I. (1996)

The transformations of such areas into viable tourist propositions in the future calls for heavy initial investment in infrastructure. Realistically, given the current economic climate within Ethiopia, the degree to which Government can contribute is limited. Thus, possibilities of using outside agencies to help develop tourism need to be explored, for example, Club Med. type operations. With its impressive scenery Ethiopia is in a position to provide one of Africa's most beautiful frameworks for the observation of wild animals. The country's best and principal tourist attractions - the ones on the Historic Route, are located on a line covered by the international round trip air ticket from Europe or America to Addis Ababa and south. Thus visits to those attractions can easily be included in a trip to Addis Ababa, Kenya or Tanzania with no additional transportation cost.

The seven major categories of tourist markets for Ethiopia would include:

- (i) Wealthy, educated people from Europe and America who would enjoy the masterpieces of Ethiopia's art, its culture and its scenery.
- (ii) Americans who visit Ethiopia as part of a 'Round Africa' tour.
- (iii) Special interest groups - mountain climbers, wildlife watchers, underwater fishery etc.
- (iv) Game hunters.
- (v) Educated people with cultural interests similar to those in group (i) but with limited financial means.
- (vi) Business persons travelling to Ethiopia or to points further south who could be induced to extend their stay in the area.
- (vii) Expatriats living in Ethiopia.

## **CONCLUSIONS**

Third World countries are faced with immense problems. Some think that tourism development is a panacea for all their problems. While a few benefited from tourism, it generally does not solve many of the problems of a country. However, an integrated approach to tourism development by using proper strategies would complement the economic development of a country. Paramount however, is that as tourism is a very susceptible activity, the country must have a positive image to appeal to potential tourists. Stable political conditions, security, adequate tourist facilities, accessibility, and friendly people are assets for a country venturing into tourism development.

Any strategy for its implementation requires the full commitment of the government and those concerned with it, cooperation of the various public and private sectors, and the community at large. As almost all attractions are located away from the main cities and towns, grass-root levels of participation of the community are important. Any decision made in developing tourism should pay attention to the preservation of cultural and traditional values of the community at large. Cooperation at departmental level is also most important. Tourism is an area which affects governmental departments such as agriculture, industry, labor, foreign and internal affairs, finance, etc, their involvement will enhance its development. The private sector must be involved by investing in areas which can cover the establishment of travel agencies, tour operation, hotels, motels, gift shops and related activities. The government can play a facilitating role.

There are basic requirements. Practically, all of these issues cannot be tackled immediately. A possible approach would be for the two countries to capitalise on the shared border and the fact that a major common denominator is the Rift Valley. From Kenya's perspective, the tourism industry has almost reached maturity. By extending the product offering to include initially, the south western portion of Ethiopia, and by including tours to Ethiopia's historical route, an impetus can be given to both countries tourism marketing. This will add an extra dimension to Kenya's product portfolio and will enable Ethiopia to develop on the basis of a guaranteed tourism influx.

In effect a solution based on a regional approach may be appropriate. A strategy that, in this case relies on exploiting the well developed tourism capability of one country, Kenya, and coupling it to the latent potential of a neighbour, Ethiopia. In such a model, there are large areas of commonality between the two countries that could be exploited.

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