

Research on the Development of The Etiquette Culture Training Industry

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Abstract: This study examines the current state and existing challenges within the etiquette culture training industry, aiming to identify future development directions for the sector. It provides reference suggestions for enterprises in the etiquette culture training industry to promote its healthy and orderly development. At the macro level, this contributes to enhancing the overall quality of China's citizens and advancing the dissemination of etiquette culture.

Keywords: Etiquette; Etiquette culture training; Industry development

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1. Introduction

1.1. Background information

The five-thousand-year-old ritual culture of the Chinese nation has evolved into an integral part of its traditional heritage, driving the advancement of Chinese civilization. As The Book of Rites states: "Ritual is reason itself!" This underscores how deeply rooted ritual culture is in the Chinese psyche, permeating every facet of society. Moreover, in today's advocacy for building a civilized and harmonious society, cultivating and developing ritual culture holds profound significance for constructing a Chinese-style civilized society.

Against this backdrop, China's etiquette and cultural education have experienced rapid development. Numerous government agencies, companies, and enterprises have begun prioritizing employee training in etiquette and cultural literacy. Since the nation's successful bid for the Olympics in 2004, etiquette and cultural training have garnered widespread public attention. Today, after two decades of development, the etiquette and cultural training industry has seen the emergence of an increasing number of training enterprises.

Over the past decade, China's etiquette and cultural training market has experienced rapid growth. According to statistics from Gonyon Network, by 2025, the Chinese etiquette and cultural training industry will exhibit high-speed growth and structural optimization driven by policy support, consumption upgrades, and technological advancements. The market scale continues to expand, achieving an upgrade from "etiquette training" to "etiquette

education and services” through digital transformation, cross-industry integration, and international cooperation. Ultimately, it will become a core vehicle for conveying China’s cultural soft power and enhancing national quality. It is estimated that the scale of China’s etiquette culture training market will reach 11 billion in 2025. See Figure 1 for details ^[1].

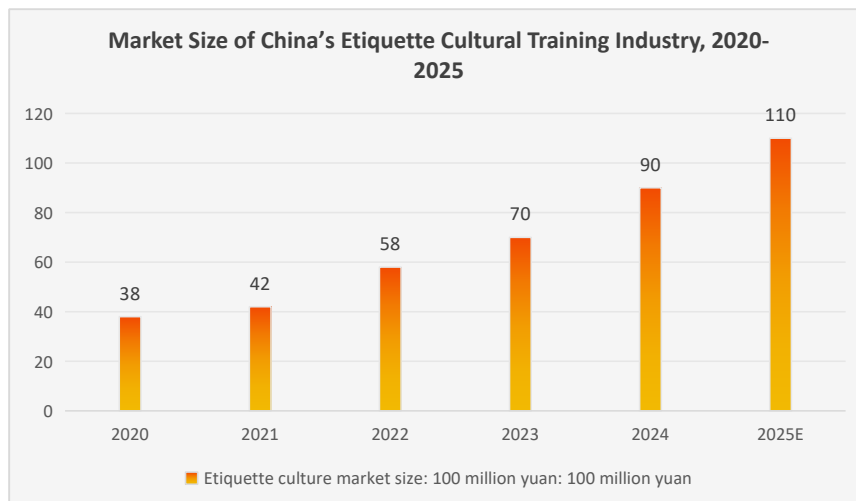


Figure 1. Market Size of China’s Etiquette Cultural Training Industry, 2020-2025 (Source: Gony Network)

1.2. Research objectives and significance

As disposable income continues to rise among the populace, people are not only prioritizing academic advancement, specialized knowledge, and cultivating personal interests, but also placing greater emphasis on developing etiquette and cultural refinement. The market scale for etiquette and cultural training services is steadily expanding, with numerous training enterprises emerging in this sector. However, many of these companies lack comprehensive capabilities, resulting in inconsistent levels of satisfaction among clients regarding both the enterprises themselves and the courses they offer. This disparity hinders the development of the etiquette and cultural industry and limits the effective dissemination of etiquette and cultural knowledge.

This study aims to comprehensively analyze the current issues within the etiquette and cultural training industry, designing a scientifically sound development path tailored to China’s national conditions. It serves as a reference for enterprises within the industry, with the goal of promoting the industry’s healthy development and the dissemination of etiquette and cultural knowledge. This initiative seeks to enhance the etiquette cultivation and cultural confidence of the Chinese people.

2. Understanding the etiquette cultural training industry

2.1. The scope of the etiquette culture industry

As a vital component of the cultural industry, the etiquette cultural industry plays a pivotal role in economic transformation and urban development. Within the field of cultural industries, numerous scholars have offered perspectives from diverse angles. Theodor Adorno and Max Horkheimer of the Frankfurt School first introduced the concept of “cultural industries” in their 1947 publication *Dialectic of Enlightenment*. In 2010, Zhang Haiyan and Wang Zhongyun noted in their research on the integrated development of tourism and cultural industries

that the cultural industry refers to economic sectors providing cultural products, as well as material facilities and intellectual services for the production and operation of such products ^[2]. While fundamentally an economic activity, it objectively satisfies the diverse cultural needs of the populace and promotes the prosperity and development of arts and culture. This encompasses numerous primary industries such as film, radio and television, newspapers and magazines, book publishing, audio-visual media, entertainment, and advertising. It also includes supporting service sectors like distribution, printing, finance, consulting, cultural brokerage, and education/training. Evidently, the etiquette and cultural training industry falls under the cultural industry.

The etiquette culture industry is a collection of organizations and sectors that rely on contemporary etiquette culture, provide etiquette services and education to the public, and publish and promote books and audio-visual products related to etiquette culture. It relies on market mechanisms for production, distribution, consumption, and reproduction. The etiquette culture industry encompasses the etiquette service industry and the production and sale of etiquette cultural products.

The etiquette service industry primarily encompasses ceremonial etiquette services and etiquette culture training. Since the reform and opening-up, etiquette culture training has emerged as a vital means of etiquette education, demonstrating significant growth potential. Beyond schools offering etiquette training, social etiquette training institutions have proliferated rapidly, including public relations associations, etiquette associations, etiquette companies, and specialized etiquette schools. These institutions cover areas such as government affairs, business etiquette, service etiquette, social etiquette, and international etiquette ^[3].

2.2. The concept of etiquette culture training industry

The etiquette cultural training industry is an emerging sector. Its upstream segment comprises instructor training enterprises, while the midstream includes individual lecturers. The downstream encompasses government clients, corporate clients, and individual consumers. The client base primarily consists of B2B and B2C customers nationwide, including government agencies and public institutions; mid-level managers in tourism, hospitality, banking, insurance, and related sectors; faculty at colleges and universities; HR personnel and training instructors at enterprises and institutions; image designers and consultants; hosts; and individuals interested in etiquette and cultural knowledge. The client age range is broad, spanning 18 to 60 years old, with the majority falling between 25 and 45. Women constitute over 90% of the total client base.

The primary objectives of clients enrolling in this program are as follows: 1. To systematically study Eastern and Western etiquette and cultural knowledge, aiming to become professional etiquette trainers or expand the knowledge base of current educators, thereby applying these insights to their teaching practices. 2. To integrate etiquette knowledge into their professional roles, enhancing workplace soft skills and increasing career competitiveness. 3. To elevate personal etiquette refinement, image, and overall demeanor.

Since etiquette cultural courses are experiential products, genuine participant engagement and hands-on experience are crucial during instruction. Therefore, the primary delivery format is in-person classroom teaching. Course content and structures across companies in the industry are largely similar, with program durations ranging from 2 to 15 days. Upon completing the full course and passing the examination, clients receive a certification issued by the relevant institution ^[4].

However, the industry's healthy development has been hindered by various issues such as immature industrial development, intense market competition, and chaotic industry practices. This paper will conduct an in-depth analysis of the current problems within the etiquette cultural training industry and propose corresponding

improvement recommendations. The aim is to promote the healthy and orderly development of the industry and enhance the international influence of China's etiquette cultural industry.

2.3. Research status of the etiquette cultural training industry

Currently, academic research on China's etiquette culture training industry remains limited, with only a handful of articles on CNKI specifically examining this sector. Among these, in 2006, Zhao Yanyun, Yu Yi, and Ma Wentao defined the scope of the cultural industry currently included in government statistics and supported by relatively detailed statistical data ^[5]; In 2022, Rao Xueling systematically outlined the concept and scope of the etiquette culture industry in her exploration of industrialization promotion pathways, categorizing it into etiquette services and the sales of etiquette cultural products. Etiquette services were further subdivided into etiquette services and etiquette training services. This paper broadly summarizes the essence of the etiquette cultural industry, its current challenges, and enhancement strategies, offering a relatively in-depth exploration into its development. However, no dedicated studies have yet examined the development of the etiquette cultural training industry. In the same year, Wang explored etiquette culture research from the perspective of ideological and political education in higher education institutions ^[6]. In 2024, Sun and Li investigated pathways for etiquette culture education among secondary school students, focusing on exploring development strategies for integrating etiquette culture into campus settings ^[7].

Overall, current research on etiquette culture in China tends to focus on specialized studies within various sectors, such as the integration of etiquette culture with tourism, healthcare, and etiquette education for university students. There is a notable lack of research addressing the development of the etiquette culture training industry within a market economy framework. Therefore, this paper aims to analyze the challenges facing the industry's development and propose corresponding enhancement strategies.

3. Analysis of current issues and causes in the development of etiquette culture training industry

3.1. Research subjects

To ensure the objectivity and validity of the research sample, this study selected key personnel within the industry and major clients as interview subjects. By approaching the analysis from both internal and external perspectives, it provides an in-depth examination of the current challenges facing the etiquette cultural training industry. Internal interviewees included executives from upstream instructor training companies and midstream individual trainers. External interviewees comprised corporate clients, individual clients, and government clients, totaling nine respondents. Specific details regarding the interviewees are presented in the table below:

Table 1. Information on internal interview participants

Interviewee	Position	Tenure	Education	Gender
Interviewee 1	Training Corporate CEO	12 years	Associate degree	Male
Interviewee 2	Head of R&D Department	5 years	Associate degree	Female
Interviewee 3	Trainer	10 years	Bachelor's degree	Female
Interviewee 4	Trainer	5 years	Master's degree	Female
Interviewee 5	Teaching Assistant	2 years	Associate degree	Female

Table 2. Information on external interview participants

Interviewee	Taken	Quantity	Position	Education	Gender
Interviewee 6	Government Etiquette, Business Etiquette	2	Government Clients	Master's degree	Male
Interviewee 7	Business Etiquette, Banking Service Etiquette	2	Mid-Level Management in Banking	Bachelor's degree	Male
Interviewee 8	Certification Course for Etiquette Trainers	3	Director of an Art Training Institution	Bachelor's degree	Female
Interviewee 9	Certification Course for Etiquette Trainers	1	Enterprise Employees	Bachelor's degree	Female

3.2. Interview outline

The interviews adopted a semi-structured format, employing open-ended guiding questions while paying close attention to details during the process to deeply explore the interviewees' genuine thoughts. Drawing upon an extensive literature review and leveraging my years of experience as an etiquette culture trainer, including multiple engagements in corporate etiquette training programs, the author developed the interview outline. To ensure effective feedback from participants, a pre-interview was conducted prior to the formal interviews, and the interview outline was revised and refined based on the outcomes of this preliminary session. Specific interview details are presented in the table below:

Table 3. Interview outline

Interviewee	Questions
Interviews with Internal Personnel	<ol style="list-style-type: none"> 1. How satisfied do you think customers are after receiving training? Why are they satisfied? / Why are they dissatisfied? 2. How do you assess the current quality of corporate training programs within the industry? Are there any reference standards in place? 3. How do you assess the current quality of enterprise services within the industry? 4. How do you assess the current competency level of trainers within the industry? 5. How do you assess the current competitive landscape within the industry? 6. What do you believe are the key strengths of the most successful companies in the industry today? 7. What do you consider to be the most significant issue currently facing the industry's development? 8. How do you think the industry will develop in the future?
Key Account Interviews	<ol style="list-style-type: none"> 1. What are your reasons for studying etiquette cultural? 2. How do you make purchasing decisions? What factors do you base them on? 3. How satisfied are you with the training you received? Why are you satisfied? / Why are you dissatisfied? 4. How would you rate the quality of the company's training courses? 5. How would you rate the company's service quality? 6. How would you rate the trainer's teaching ability? 7. What do you consider to be the most significant issue currently facing the industry's development? 8. How do you think the industry will develop in the future?

3.3. Interview process

This interview series will be conducted via online voice calls, each lasting 20–25 minutes to facilitate transcription. With participants' consent, colloquial expressions in the transcribed content will be adjusted and confirmed by interviewees to enhance data credibility.

3.4. Data analysis and results

This paper conducted a detailed, sentence-by-sentence analysis of the raw data, selecting statements with high repetition rates to extract and categorize specific concepts. Subsequently, different concepts underwent focused processing, ultimately yielding the following three core categories. As shown in the table below:

Table 4. Data encoding table

Original statement (Partial)	Concept	Initial category	Core category
“What’s the point of getting this etiquette trainer certification?”	The client wishes to obtain a professional qualification certificate but is uncertain about its value and lacks confidence in the company.	The industrial management system is inadequate, and teacher certification lags behind market development.	Management-level factors
“Last time I was training at another company, the trainer said something different... I’m not sure which one is correct.”	Knowledge point standards are vague or non-existent.	Lack of nationally certified standards	
“Some teachers’ styles don’t quite fit as a trainer...”	Fails to meet the standards required of a trainer, resulting in customer dissatisfaction.	Teacher certification lags behind, and teaching capabilities are insufficient.	
“After completing the course, it still comes down to personal effort—the platform can’t connect me with resources.”	Platform is unable to fulfill its commitments.	Exaggerated advertising, cutthroat competition	Market-level factors
“It’s getting harder and harder to recruit students, and survival is becoming increasingly difficult.”	Economic downturn, customers siphoned off by large enterprises	The business model is unsustainable.	
“Many of the examples the teacher cited were about flight attendants....”	Service-oriented, one-sided	The courses lack advanced depth.	Product-level factors
“Not really interested in learning it, but the company is organizing it...”	I’ve studied it several times, and each time it’s pretty much the same.	Teaching methods are monotonous, resulting in a lack of engaging experience.	
“...The etiquette knowledge is pretty much the same, but the teacher’s explanation was still quite good...”	Courses are severely homogenized.	Insufficient course development capabilities	
“...Why do this? I don’t want to be tied down...”	The content is dogmatic and out of step with current social development.	Products are outdated	

3.4.1. Management-level factors

Management-level factors form the cornerstone of healthy industry development. The current management system for the etiquette cultural training market remains inadequate, lacking industry standards. Specifically, despite over two decades of development, the etiquette cultural training sector has consistently lacked standardized industry norms. It was not until 2024 that the Ministry of Human Resources and Social Security issued the “Occupational Competency Standards for Etiquette Trainers”, establishing the first unified system for instructor assessment and rating. The newly revised Vocational Education Law of 2025 incorporates etiquette and cultural training into the

lifelong education system. However, the industry still lacks effective regulatory measures, quality assessment frameworks, and evaluation benchmarks. This manifests in some etiquette trainers taking the podium without meeting the required professional competency standards. The lag in instructor certification behind market development has led to questionable course quality and misguided trainees. The absence of relevant regulatory measures, evaluation systems, and assessment standards has adversely impacted industry growth. Even when most etiquette trainers possess relevant professional certificates, these credentials often reflect low assessment difficulty. Consequently, the industry's entry barriers remain low, resulting in inconsistent instructor competency.

Even highly accomplished etiquette trainers with polished teaching techniques and styles beloved by students face challenges. The lack of official standards or reference frameworks for etiquette content—relying solely on standards set by individual companies—results in inconsistent training materials and varying standards. With each enterprise holding its own interpretation and no universally accepted correct approach, students often leave training sessions confused. For instance, in service etiquette, there are numerous interpretations regarding the proper hand position for female service staff. This has also hindered the promotion of etiquette culture and created bottlenecks in the development of the etiquette culture industry.

3.4.2. Market-level factors

First, the etiquette training industry itself occupies a relatively niche market. Currently, the training sector is nearly saturated, and the industry features low barriers to entry and exit. Consequently, during its peak growth phase, nearly 20,000 training companies operated within it. Most leading firms were concentrated in first-tier or new first-tier cities like Beijing, Shanghai, Guangzhou, and Shenzhen, with some presence in provincial capitals. Intense competition has driven companies into a vicious cycle of exaggerated advertising and mutual disparagement. After customers make purchasing decisions after careful consideration, their overly high expectations often lead to a gap between perceived value and actual training outcomes. This discrepancy results in declining customer satisfaction and an increase in after-sales service issues.

Secondly, the intensifying competition in the etiquette training market in recent years stems from the emergence of leading companies within the industry, which have created a siphoning effect on small and medium-sized enterprises. Consequently, survival has become increasingly difficult for SMEs. Compounded by the economic downturn, clients have reduced their purchasing budgets, further exacerbating market competition.

Moreover, the business model within the etiquette culture training market undermines the industry's sustainable development. Becoming an etiquette culture instructor requires only a few days of study and passing an exam to obtain certification. This low barrier to entry allows individuals to quickly enter the industry after minimal training, further fragmenting the market. Meanwhile, training providers fail to integrate these clients for collaborative growth. Consequently, this exploitative business model inevitably intensifies market competition in the short term.

3.4.3. Product-level factors

First, most courses developed by companies in the industry today are highly similar in both content and format, characterized by an emphasis on etiquette at the expense of cultural depth. These courses tend to be one-sided, focusing on promoting service skills, physical presentation, image, mindset, and concepts, while lacking a profound understanding of the rich cultural foundations underlying etiquette.

Secondly, a significant portion of clients have reported that the course content is overly dogmatic, failing to align with current societal changes and the psychological needs of younger generations. This has led to learners'

psychological rejection and non-acceptance. The root cause lies in outdated products with slow update cycles, where etiquette and cultural knowledge, along with case studies, have remained unchanged for years. In some cases, even a single trainer delivers identical content and scripts in every session.

Additionally, course content and instructional design across companies in the industry are largely similar, consisting primarily of in-person experiential courses. In recent years, participants have gradually lost interest in this traditional, monotonous teaching model, resulting in diminished engagement. While the industry has attempted to develop online courses or enrich course design and teaching formats, overall customer experience has not seen a significant improvement.

Course content is repetitive and one-sided, products are outdated, advanced course offerings are insufficient, and teaching methods remain traditional and monotonous. This series of issues stems from a lack of highly qualified professionals within the industry.

Taking etiquette culture trainers as an example, a competent trainer should possess both a solid foundation in traditional culture and basic knowledge in areas such as marketing management, along with a systematic understanding of etiquette culture.

Currently, most professional etiquette cultural trainers transition from other industries, predominantly from fields like vocational training, flight attendants, and hosts. The majority hold bachelor's degrees, some possess associate degrees, and a small number have master's degrees, often in arts-related disciplines. Overall, they have limited professional experience, relatively weak cultural foundations, and insufficient depth in understanding etiquette and cultural knowledge. Only a handful of trainers in the industry possess high-standard training capabilities. For instance, etiquette expert Wen Quan previously served as Director of the International Exchange Center at the China Foreign Affairs University, Deputy Director of the University's Foreign Affairs Office, and Head of the Exchange Studies Teaching and Research Section. He also has a background working in the Protocol Department of the Ministry of Foreign Affairs and extensive overseas experience. However, such expert instructors are extremely rare, making it impossible to establish a healthy and stable talent pipeline.

Moreover, as mentioned earlier, the industry has relatively low entry barriers, and trainer certifications are relatively easy to obtain. Therefore, holding a certificate does not necessarily reflect professional competence, and the industry is flooded with a large number of low-level trainers.

4. Improvement strategies

To further promote the dissemination of China's etiquette culture and advance the development of the etiquette training industry, based on the aforementioned analysis of the etiquette culture sector, this paper proposes the following strategies across three dimensions: management, market, and product.

4.1. Management-level factors

At the management level, core standards must be established through three key approaches: First, led by the Department of Vocational Education of the Ministry of Education and the National Etiquette and Culture Industry Alliance, organize university experts and seasoned industry practitioners to jointly develop the National Guideline Catalog for Etiquette and Culture Training Content. This catalog will standardize core content by field, establish content boundaries, and require all training institutions to align their curricula with the catalog, ensuring "uniform standards and consistent terminology" across the industry.

Secondly, based on the 2024 Ministry of Human Resources and Social Security's Occupational Competency

Standards for Etiquette Trainers, the Ministry of Culture and Tourism and the Ministry of Human Resources and Social Security jointly issued the Detailed Rules for the Practice Management of Etiquette and Culture Trainers, establishing a “Three-Tier Certification + Dual Assessment” entry mechanism. The three-tier certification classifies trainers as: (1) Entry-level (basic etiquette instruction); (2) Intermediate (specialized field instruction); (3) Advanced (cultural research and high-level training). The dual assessment evaluates both competency in etiquette knowledge, teaching techniques, and cultural literacy, alongside qualification review of professional experience (e.g., accumulated teaching hours for upgrades, years of industry expertise for advanced levels), eliminating the chaos of “short-term training followed by immediate certification and employment.”

Finally, third-party institutions authorized by the human resources and social security department will uniformly organize assessments and issue a nationally recognized Professional Qualification Certificate for Etiquette Trainers. This will increase assessment difficulty and strengthen evaluations of cultural literacy and practical skills, eliminating the practice of “paying for certificates.”

4.2. Market-level factors

First is the upgrade of the business model, building a long-term value closed loop. The teacher training model shifts from “one-time certification” to “life-cycle empowerment.” Teacher training enterprises no longer merely provide “certification services”, but instead establish a closed loop of “training-incubation-empowerment-co-creation.” For instance, providing trainees with hands-on guidance for subsequent teaching, observing master instructors’ courses, receiving mentorship from master instructors, sharing course materials, and facilitating project connections—transforming trainees from “market competitors” into “ecosystem collaborators.” The three-tier certification system enables enterprises to establish a tiered faculty management framework. Based on teaching proficiency and client evaluations, high-tier instructors are prioritized for premium projects, while pricing and scope for lower-tier instructors are restricted to prevent disorderly competition.

4.3. Product-level factors

The etiquette cultural training industry faces a significant shortage of skilled professionals, leading to issues such as homogenized content, outdated frameworks, and ineffective teaching methods. To address these challenges, we propose a systematic approach focusing on three areas:

Content Optimization: Develop a “Etiquette + Culture” framework by forming a dual-track R&D team of industry experts and cultural scholars. This includes curriculum design by diplomatic protocol specialists and modules on “New Media Social Etiquette” to enhance relevance and broaden scenario coverage.

Innovative Formats: Utilize VR for immersive training and AI for real-time feedback on body language and vocal intonation. Implement a hybrid model combining live streaming, recorded sessions, practical training, and online assessments, enhancing engagement and skills.

Talent Development: Establish a multi-tiered talent cultivation system in universities, offering degrees in etiquette and cross-cultural communication. Create “Etiquette Culture Expert Workstations” for advanced training and promote collaboration between universities and industry, fostering a cycle of talent development and practical enhancement.

5. Conclusion

This study focuses on the etiquette training culture industry, systematically analyzing its core challenges across

three dimensions—management, market, and product—through interview research. Key issues include: inadequate management systems and lack of industry standards; intense market competition with homogeneous offerings, making survival difficult for small and medium-sized enterprises; and outdated course content, monotonous teaching formats, coupled with a severe shortage of high-caliber talent. To address these pain points, the study proposes targeted strategies across three dimensions: management standardization, market differentiation, and dual product-talent upgrading. These include: refining instructor and content standards; deepening specialization in niche segments and overseas markets; enriching the cultural depth of curricula; innovating intelligent teaching models; and establishing a collaborative talent system linking universities and industry. These strategies can serve as a reference for industry enterprises to break through development bottlenecks, helping the sector transition from “shallow training” to “advanced education.” This will, in turn, promote the dissemination of Chinese etiquette culture, elevate national literacy, and strengthen cultural confidence. Future efforts should focus on driving the implementation of strategies, continuously optimizing the industrial ecosystem, and achieving healthy and orderly development.

Due to limitations in research perspectives and data acquisition, this study requires further exploration into differentiated development paths for enterprises of varying scales. Subsequent research could focus on survival strategies and international market expansion models for small and medium-sized etiquette culture training enterprises, providing more targeted references for industry development.

Disclosure statement

The authors declare no conflict of interest.

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