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COLLEGE OF DEVELOPMENT STUDIES

CENTER FOR ENVIRONMENT AND DEVELOPMENT

TOURISM DEVELOPMENT AND MANAGEMENT PROGRAM

ETHIOPIAN AIRLINES ROLE IN TOURISM DESTINATION COMPETITIVENESS: IMPLICATIONS FOR TRAVEL AND TOURISM DEVELOPMENT IN ETHIOPIA

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A Thesis Submitted to Addis Ababa University, Center for Environment and Development Studies, Tourism Development and Management Program, in Partial Fulfillment of the Requirement for Master of Arts in Tourism Development and Management

June, 2019

Addis Ababa, Ethiopia

DECLARATION

I, Mathewos Woldemariam, declare that this study has been prepared for **Master** of Arts in Tourism Development and Managemen**t** entitled, **"Ethiopian *Airlines Role in Tourism Destination Competitiveness: Implications for Travel and Tourism Development in Ethiopia"*** is a result of my original research work carried out by me. The matter embodied in this MA thesis has not been submitted for the award of any degree, diploma or certificate courses, by any candidate at any university. I have prepared it with my own effort independently .To the best of my knowledge, I have fully acknowledged the materials and pieces of information used in the study .All the research procedures do comply with the expected standards and regulations of Addis Ababa University

Name: **Mathewos Wolde Mariam**

Signature ___________

Date of Submission: **June, 2019**

CERTIFICATION

This is to certify that this **MA** Thesis entitled, **'Ethiopian *Airlines Role in Tourism Destination Competitiveness: Implications for Travel and Tourism Development in Ethiopia "*** *is* submitted in partial fulfillment of the requirements for the award of the Degree of Masters in Tourism Development and Management to the College of Development Studies, Addis Ababa University. Where it is done, by Mr. **MATHEWOS WOLDEMARIAM**, is a genuine work carried out by him under my supervision. The matter embodied in this thesis has not been submitted earlier for award of any degree or diploma to the best of my knowledge and belief. Approved by:

Thesis Advisor, Tamirat Teferra (PhD): Signature ________________________

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As members of the Board of Examination of the Masters of Degree thesis open defense, we certify that we have read and evaluated the thesis prepared by Mr. **Mathewos Woldemariam** and examined the candidate. We recommend that the thesis be accepted as fulfilling the requirements for the award of Degree of Masters in Tourism Development and Management.

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External Examiner	Signature	Date
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Internal Examiner	Signature	Date

Dedication

This *thesis* is dedicated to 157 passengers on board, all who have lost their lives in that tragic accident, of the Ethiopian plane crash- Boeing 737 Max 8; Ethiopian Airlines flight ET302, on 10 March 2019. May Your Soul Rest in Eternal Peace!

Acknowledgements

I would like to express my gratitude to my thesis advisor Tamirat Tefera (PhD) for his advice and friendly approach in the process of the entire research work. Indeed, Tesfaye Zeleke (PhD), Ermias Teferi (PhD) and all professors and home base- lecturers of CoDS at AAU, I am grateful for your Knowledge impart throughout the courses taught.

This study wouldn't be realized if these individuals, Organizations and Institutions hadn't provided me inputs for the study during in the course of the study. And thus, I would like to express my heartfelt gratitude to Yacob Arsano, Associate Professor at Addis Ababa University and the director of AAUP, who authorized the permission for my study; all the staff who are working for Ethiopian Civil Aviation Authority, Ethiopian Airlines group, especially ET-Holidays employees, Ministry of Culture and Tourism and Tourism Ethiopia; information desk officers, tour guides of the Museum at Institute for Ethiopian Studies(IES) in Addis Ababa University; and receptionists in international hotels in Addis , for your guidance of international tourists while they were completing the survey questions, and in getting handed the collected papers to the researcher

I owe special thanks to Zewdu H.Mariam (PhD), head, Ethiopia- Holidays, for his humble welcoming me for key informant interview and all the staff at EAL, their kind hospitality and professional service which they have rendered me, and for their valuable support in source materials availing during data collection. I would also like to express my sincere appreciation and gratitude to Ato Anmut Lemma –Manager; promotion and Public Relations and the staff of ECAA, for their courtesy and humble welcoming me to undertake KII, for their participation as, one of the major stakeholders in the study.

Finally, my especial gratitude is also due to the key informant interviewees, discussants and international tourists to whom I talked to them and met them face-to- face on the spot during data collection. In connection to this, I'm grateful for the time and information that you all have shared in public.

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ABBREVIATIONS and ACRONYM

ATS- Air Traffic Service
CFA- Confirmatory Factor Analysis
ECAA- Ethiopian Civil Aviation Authority
EAL – Ethiopian Airlines
EFA--- Exploratory Factor Analysis
ET- Ethiopian Airlines (code for air- crafts)
FAA- the Federal Aviation Administration –operating mode of the U.S. Department of Air Transport
FDRE - the Federal Democratic Republic of Ethiopia
FDI - Foreign Direct Investment
FSC –Full Service Carrier
GCR- Global Competitiveness Report
GDP- Gross Domestic Product
GTP I & GTP II- Growth and Transformation Plan
IATA –International Air- Transport Association
IAC- IATA's Industry Affairs Committee
ICAO- The International Civil Aviation Organization
ISO – International Organization for Standardization
LCCs- Low Cost Carriers
LHLC -The Long-haul, Low Cost
MICE - Meetings, Incentives, Conventions, and Event tourism/ Exhibitions
MCDM---Multiple Criteria Decision Making
MoCT—Ministry of Culture and Tourism
NTDP – National Tourism Development Policy
OECD- Organization for Economic Co-operation and Development
PESTEL –Political, Economic, Socio-cultural, Technological, Environmental and Legal
SDGs—Sustainable Development Goals
TTCI -Travel and Tourism Competitiveness Index
TDC- Tourism Destination Competitiveness
TSA- Tourism Satellite Account
UNECA --- United Nations Economic Commission for Africa.
UNESCO –United Nations Educational, Scientific and Cultural Organization
UNWTO – World Tourism Organization
WAEMA – West Africa Economic and Monetary Union
WTTC – World Travel and Tourism Council

Abstract

Although tourism is increasingly promoted as an important source of economic growth, especially in Ethiopia, where its contribution has become crucially important to the country's GDP growth ---this in turn, is believed as positively impacts on the travel and tourism industry GDP in general and hospitality industry employment in particular, yet without an efficient air transport system, it is almost impossible for landlocked developing nations, like Ethiopia, for ensuring its sustainability. Indeed, almost 100 percent of the international tourist -arrivals in Ethiopia is through Air-Transport (this means, with extreme cases, 100 percent of international tourist arrivals account for this form of transportation mode has been guaranteed by Air- transport). Hence, this study aims at exploring into the contribution of Ethiopian Airlines key roles, for facilitating tourist arrivals and departures through its hub at Bole International Airport , in tourist market-making activities, conveying tourist inflows, route network expansion, foreign exchange services, tourism service infrastructure improvements, promoting endowed resources, etc. along with its major stakeholders--- to-promote Ethiopia's endowed resources within its world destination- countries and to attract international tourists to Ethiopia . Thus, the study is intended to answer the research questions (1) what are the Ethiopian Airlines key roles in promoting tourism resources? (2) to what extent Ethiopian Airlines has to take a lead, in promoting tourism resources ,so as Ethiopia ranks against other countries, with its national full of tourism potentials--to maintaining its tourism destination competiveness position in Africa and beyond via Ethiopian Airlines ? To achieve the objective of the study, mixed research method was employed. Primary data was administered randomly from 360 international tourists who used to arrive in Ethiopia, in March and April 2019, for leisure as well as business travel. The tourists also filled out the survey questions for the study, along with 40 participants who were selected from the major stakeholders in the industry. Thematically coded empirical and documentary data were analyzed on the view points of the theoretical and conceptual framework of the research design, and assumptions modeling were also established on the basis of the research questions. An important finding emerged in this study was that, despite EAL has been operating route network expansion in 107 destination- countries throughout the world, as a key role, and promoting Ethiopia's endowed resources through conventional and digital media aggressively; yet travel and tourism destination competitiveness Index (WTTC, 2007-2017) rank of Ethiopia since 2007- 2017/18 ,was averaged only 118.33/140) .So, it hasn't been significantly improved ; nor Ethiopia's world heritages hadn't been well known by international tourists in the globe. Furthermore, the core finding of the study has shown that there is a loosely created synergy between the EAL's key roles and its major stakeholders' strategic plan. Ultimately, their plans were merely linked within the EAL's vision 2020. However, a number of limitations need to be considered, because of tourist service infrastructure and a loosely created synergy among the major stakeholders in the industry, Ethiopia is not harnessing the existing tourism potential from its natural and cultural world heritage sites. Although the study has framed the preliminary findings, and yet further research should be done to better understanding of EAL's key roles in tourism destination competitiveness perspective.

Key words*: Ethiopian Airlines; Destination Competitiveness Factors; Destination Competitiveness Indicators; World Travel and Tourism Council (WTTC)*

CHAPTER ONE

INTRODUCTION

1.1 Background

Historically, traveling by air-transport was perceived as a luxury good, but in recent aviation's perspective, it is a serving tool for lowering travel barriers with the cost of air-travel continuing to decline and the growth in the number of middle income 'new traveling' households set increased(WTTC, 2017).Specifically the aviation industries progress in making low cost carriers, within air transport competition has put traveling by air- transport, is a means to reaching some miles from country of origins to the intended destination easily and timely nowadays. However, the 21st century travelers demand high expectations for air transport efficiency and low tolerance for barriers in global mobility. And yet, tourism service infrastructure, country's level of economic growth, tourist condition in destination's preference, bureaucracy of the destination countries and regulatory framework limitations etc., have embarked on travelers, why they must navigate decidedly where to travel, and how to travel, before they made their travel decision. Alternatively, destination -countries and academia have been working in collaboration with the major stakeholders, to solve these barriers, by being focused on the specific research up takings, in order to bridge the traveler's knowledge gap in this regard.

On one hand, exploring into the historical development of aviation would shed light on the parallel evolution of the tourism industry development and it would reveal some of the connections between them, together with the reasons behind them. Thus, in order to reveal the most important facts of aviation history, and still to adhere to the primary purpose of it; and to examine the correlation between air- transport and tourism industry, to compile the essential moments of air transport evolution and show in parallel how both being influenced (directly or indirectly) each other; Papatheodorou and Zenelis (2013) discussed the historical evolution of both sectors that as if how they reveal this dramatic interdependence. The supply side from air-transport pushes people's desire to go somewhere in order to be engaged in spatially constrained activities (including leisure and business tourism), and subsequently it determines air- transport accessibility, in a great extent, the demand for tourism destinations competitiveness (Graham et al., 2008). Hence, these two sectors of the economy are structurally interdependent.

This also implies that both industries should be considered simultaneously and should work more closely for mutual benefit. Dwyer et al (2010) noticeably highlighted that international aviation agreements were negotiated between countries with no reference to any negative impacts that they might have on other industries, especially on tourism. Similarly, Forsyth (2010) ensures that either of them have an impact on each other and the trade-off between the airline and tourism industries.

Likewise, looking into more closely at the relationship between air transport and tourism, Duval (2007) identified that air-transport represents the tourism system at a micro level to play the key role in facilitation and exploring of tourist destinations, for destination competitiveness scales or effectiveness. Conversely, Prideaux(2000) and Page (2009) stipulate that the relationship between air-transport and tourism is more complex because it comprises of multidisciplinary aspects and players in both industries.

On the other hand, air connectivity is crucial for tourism development, not only in Africa but for any tourist destination in the globe. For instance in 2015, more than half (54 per cent) of all overnight visitors worldwide reached their destination by air, and the trend points to a gradual increase in the share of air transport (UNWTO, 2016a). Indeed, the recent (WTTC, 2019), produced annual research report shows that Travel and Tourism has significantly impacted on the world's largest economic sectors, supporting over 319 million jobs (i.e., 10.4% of world's GDP and 1 in 11 of all jobs), and 3.9 percent direct travel and tourism GDP growth and contributed US$ 8.8 TN from international tourist receipts. The UNWTO report also noted that international tourist arrivals grew 6% in the first six months of 2018 compared to the same period of 2017, reflecting a continuation of the strong results of 2017 .This was believed to happen, because the aviation industry has been adapting to the changing international context and showing progress on multiple fronts. Some of the most important advances are in those elements where the *aviatio*n's progress counted to this positive impact.

However, according to UNWTO (2019) report- outlook, world Travel and Tourism industries have been experiencing some obstacles. Typically for the most parts of Africa, they aren't making travelers satisfying within their country -destinations, nor they are efficient with their air transport services and tolerant between developed and developing countries tourist product offerings despite a number of solutions which had been provided- ranging from bilateral to regional agreements to support the reduction of travel barriers and enable economic growth and job creation. And yet, particularly in Africa, air connectivity is a necessity, as long as long-haul distances are planned for traveling--- adversely to skip poor road transportation and its infrastructure, tourism's dependence on air transport is crucially importance. Thus, the relevance of air transport goes far beyond the tourism sector. First, it is a catalyst for socioeconomic development. Second, it serves for the integration of host communities within the world community. Thirdly, developing a strong Travel and Tourism sector supports job *creation, raises national income, and also benefits the general competitiveness of economies through improvements in hard and soft infrastructure investments* (as highlighted by Global Agenda Issue Survey; Box 1).

Despite this relevance, air connectivity is one of the major constraints for tourism growth in Africa. As revealed by ICAO- UNWTO (2013) joint research, separate sector policies on air transport and tourism result in, inbound tourism- in Africa is fundamentally or too often even conflicting, disconnected from tourism policy, which constitutes a severe constraint on the development of travel and tourism. Similarly, according to the African Union (African Union, 2016; 42), air connectivity and travel costs remain challenging where air transport in particular and tourism service infrastructure generally, remain, to date, the biggest challenges for travel and tourism development in Africa. Furthermore, African States are still non-compliant with Abuja aviation safety targets for Africa. Unlike countries that have been more active in signing bilateral agreements—Ethiopia, Kenya and South Africa, except countries in West Africa rely on privately owned companies, all other African countries still maintaining *unprofitable, inefficient a*nd *insecure publicly-owned national aviation companies*

Notably, air service to and within Africa is limited, with relatively few airlines dominating the market. Apart from this, many airline industries in developing countries, even Ethiopian Airlines, which they have been facing sever challenges are *fuel prices, air craft costs, and air fare increases, less quality in tourism service infrastructure, maintenance cost and global mind set of human resource to operate the airlines business*. Furthermore, although the continent comprises 15 per cent of the world's population, it is served by only 4 per cent of the world's scheduled air service seats (SH and E., 2010). The gaps in air service coverage are particularly acute for intra-African connectivity ((Christie et al., 2014).

Schlumberger (2010) also highlights that air services between African States have been predominantly regulated on the basis of restrictive bilateral agreements despite the fact that closer cooperation among African airline companies were sought through the Yamoussoukro Declaration [1](1988), whose primary purpose was to create conducive environment for the development of intra-African and international air services. However, the declaration envisaged only a gradual elimination of traffic rights, and it was only a decade later, when the Yamoussoukro decision was reached in 1999, that the policy focus shifted towards liberalizing. In addition, Schlumberger (2010) pointed out that access to intra-African air service markets, twenty-five African countries have had only (small) private airlines[2].Twenty countries[3]subsidized their carriers using public funds or by obtaining government-directed advantage such as airport privileges for the flag carrier(i.e. five African countries[4] are *Egypt, Ethiopia, Kenya, Morocco, and South Africa* had dominating state-owned carriers),in Africa's principal airline hubs – Johannesburg, Nairobi, and Addis Ababa – handled 36% of cross-border air traffic in Africa. Consequently, WTTC (2017) index report shows that Sub-Saharan Africa remains on aggregate, where Travel and Tourism competitiveness was the least developed. Although regional performance has been increased (i.e. data from Africa points to a 7% increase in 2018: North Africa +10%, Sub-Saharan +6%, reaching an estimated 67 million arrivals). And yet, it was improved less compared to other parts of the world. Southern Africa remains the strongest sub-region, followed by Eastern Africa and then Western Africa. On average, Eastern Africa is the most improved region, thus, its showcases are South Africa (53rd), Mauritius

- [1]Full liberalization of intra-African air transport services in terms of access, capacity, frequency, and tariffs
- Free exercise of first, second, third, fourth and fifth freedom rights for passenger and freight air services by eligible airlines (These rights, granted by most international air service agreements, enable, among others, non-national carriers to land in a state and take on traffic coming from or destined for a third state.)
- Liberalized tariffs and fair competition
- Compliance with established ICAO safety standards and recommended practices
- United Nations. Economic Commission for Africa (1988-10).Declaration of Yamoussoukro on a new African Air Transport Policy. Addis Ababa: © UN. ECAhttp://hdl.handle.net/10855/13773

[2] Botswana, Burkina Faso, Burundi, Chad, the Democratic Republic of Congo, the Republic of Congo, Côte d'Ivoire, Equatorial Guinea, Eritrea, Gabon, The Gambia, Ghana, Guinea, Guinea-Bissau, Liberia, Nigeria, Rwanda, São Tomé and Principe, Senegal, Sierra Leone, Somalia, Swaziland, Togo, Uganda, and Zambia

[3] Algeria, Angola, Botswana, Cameroon, Cape Verde, Comoros, Djibouti, Libya, Madagascar, Malawi, Mali, Mauritania, Mauritius, Mozambique, Namibia, Seychelles, Sudan, Tanzania, Tunisia, and Zimbabwe

[4] Egypt, Ethiopia, Kenya, Morocco, and South Africa

(55th), Kenya (80th), Namibia (82nd) and Ethiopia (116th), as its six most Travel and Tourism competitive economies show despite sustained economic growth in Travel and Tourism remains mostly untapped.

Contrast to this, Gloria (2019) witnessed that, Ethiopia's Travel and Tourism boom was one of the great success stories of 2018. In her official visit to Ethiopia, she has also remarked that Ethiopia's Travel and Tourism has exceeded its sector's global and regional comparisons to record the highest level of growth of any other country in 2018, that was driven by the very strong performance of *aviation industry in the country and the development of Addis Ababa as a dynamic and growing regional hub*. That effort had to owe the credit to which it was given, is that, the performance effectiveness of Ethiopian Airlines rather than major stakeholders in the industry (i.e. Ministry of Culture and Tourism 'MoCT', the Ethiopian Tourism Organization (ETO)[5], Hoteliers, nor the hard working effort of Ethiopian tour operators).

In the same manner, the World Travel and Tourism Council's (WTTC, 2019) report has lauded Ethiopia's drastic growth in the tourism sector in 2018. It was reported that Ethiopia's tourism sector was grown by a staggering 48.6 percent in 2018, to be worth $7.4 billion. That made up 9.4 percent of the economy and had created 2.2 million jobs, and over eight percent of Ethiopia's total workforce growth in tourism. Highlighting that the international Travel and Tourism spending made up "a massive 61 percent of exports in the country," WTTC pointed out that stunning growth could be attributed, in part, to Ethiopia's improved connectivity as a regional transport hub and to recent visa relaxation policies.' Commenting on the global trend', the report also highlighted that one in five of all new jobs created on the globe were created by travel and tourism over the past five years, showing the growing importance of the sector to the global economy. WTTC's report has further stated that travel and tourism's growth in 2019 has been expected "to remain resilient" despite a slowing global economy. Hence, its forecasts pointed out that a 3.6 percent expansion for travel and tourism, faster than an expected global economy growth of 2.9 percent in 2019, Travel and tourism GDP grew by 5.6 percent in 2018, significantly above the African economic growth rate of 3.2 percent because of the development and implementation of policies that stimulate aggressive travel promotions held through different promotional platforms.

[5] ETO- recently its name has been changed into Tourism Ethiopia

As a result, as per the statistics of WTTC(2018) report, Travel and Tourism sector across 185 country -economies, shows that the Ethiopian Travel and Tourism sector has significantly outpaced the global growth rate of 3.9%, the African growth rate of 5.6% supported by 2.2 million jobs, or 8.3% of total employment was primarily driven by leisure travelers: 79% of the Travel and Tourism spending was generated by leisure visitors and 21% from business travelers which is strongly weighted towards international travel as: 77% of the Travel and Tourism spending came from international travelers and 23% from domestic travel.

Similarly, Tony Hicker[6] (2017) witnessed "there is absolutely no doubt about Ethiopia, it has wonderful tourist attractions and that has been well attested by a score of tourist guide books, such as Lonely Planet and the Bradt Guide, documentary films, countless newspaper, magazine articles, and postings on the social Medias," despite the steady increase in tourist arrivals in the destination country (Ethiopia), yet it quests for its growth progress and ranks improvement that it has shown so far.

To this end, the study was believed to address two major research questions about Travel and Tourism industry in Ethiopia. First, *what are the Ethiopian Airlines key roles in promoting tourism resources in Ethiopia?* By providing a cross-country analysis on tourism destination competitiveness determinant factors and indicators, which drive international tourist- flows to Ethiopia, and this leads in identifying the key roles which have been undertaken by Ethiopian Airlines in the Travel and Tourism industry so far. Second, *to what extent Ethiopia ranks against other countries, with its national full of tourism potentials--in maintaining its tourism destination competiveness position in Africa and beyond via Ethiopian Airlines* ? Answering these questions was believed to add to the knowledge gaps over the Travel and Tourism industry's performance effectiveness of Ethiopia. Crucially importance, this enlighten the minds or understanding of national policymakers through which policy attention would be drown ; and it enables dialogue between the private and public sectors to improve the tourist service infrastructure development at the national level.

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[6] *Tony Hickey who* contributed an article in the Ethiopian Reporter News Paper: 25 November 2017, and *the general manager of Ethiopian Quadrants PLC (ethiopianquadrants@gmail.com).*

Finally, as it is introduced, the study was significantly dedicated to address the most important component of the research questions on the travel and tourism destination competitiveness determinant factors and indicators' toolkits, the key role played by Ethiopian Airlines, while it has been implementing its long term strategic plan (i.e., Vision 2035) in promoting Ethiopia's tourism resources within its more than 107 destination -countries throughout the world. However, this effort in turn, has had limited ranks' improvement of Ethiopia against other countries in Africa as well as in the globe in tourism destination competitiveness performance effectiveness. And yet, the overall effort of Ethiopian Airlines key role is the way forwarding issue of the tourism promotional roadmaps, of Ethiopia's Travel and Tourism industry development, to getting improved.

1.2 Statements of the problem

Since *1944*[7], Ethiopian Airlines has been building bridges in gathering world nations (inbound and outbound travelers) to Addis Ababa international airport, as a Hub; or it serves as a stopover for about 75 years. And it has been working as a prime vehicle for inter- Airline Company which is promoting safe, reliable, secure and low cost carrier air-transport service for local and global visitors.

Although tourism is increasingly promoted as an important source of economic growth especially in developing countries, While there are many elements that contribute to tourism growth, yet without an efficient air transport system, it is almost impossible for landlocked developing nations, like Ethiopia, where almost 100 percent of the international tourists are getting arrived in Ethiopia through Air-Transport(this means, ,with extreme cases, 100 percent of all international tourist arrivals account for this form of transportation mode has been done by *Air -Transport).* To this end, Ethiopian- Airlines has been at the forefront of the African airlines association, and it is a platform for sharing its best practice for a newly establishing air transport industries. However, it is open for argument that it is operating a legacy from the traditional

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[7]*In 1944*[7] *the Ethiopian government was invited by the United States of America to attend the Chicago conference of December 7, 1944. This made Ethiopia, as one of the few African nations used to sign the convention of the International Civil Aviation Organization (ICAO). The same year another major step was taken by the Government of Ethiopia and the Civil Aviation Authority (ECAA) was founded.*

restrictive regulation on the old non- competing national airlines model which has been adapted by governments in *1945*[8]as the full service provider modeling international aviation scheme. And yet it holds monopoly on domestic routes despite its reputation and performing high profitability business strategy, where notably, it has been claiming for.

Nevertheless, Ethiopian Airlines has been stuck for its 100 percent state-owned growth strategy, through which the government's ownership in regulatory interference is high, on commercial decision making and markets development issues. This in turn, has negative impacts on intensive capital budget allocations for air craft's and tourist service infrastructure expenses. In addition, East African air- transport survey (World Bank Group, 2005) reported that the performance and attributes of tourism destination competitiveness indexes of Ethiopia quests for the research concern. For instance, although Ethiopia is as a national full of potentials in tourism, with its Nine natural and cultural world heritage sites registered *by* UNESCO, and yet Ethiopia is not harnessing the existing potential from its natural and cultural world heritage sites*; nor* its endowed natural and cultural world heritage sites hadn't been well known among the top 25 tourist destination lists on the continent (CNN Travel: inside Africa, 2018 documentary) either.

In 1945[8]*Ethiopian Airlines was founded with six-second world surplus DC-3/c-47 airplanes;*

Table 1: International Tourist arrivals to Ethiopia since 2012 and its pillar ranks and scores

NO	Year	No. of International Tourist Arrivals since 2012	Pillar Ranks and scores
1	2012	596,341	
2	2013	681,000	2012-13, 121/144 : 3.6
3	2014	770,000	2013-14, 127/148 : 3.5
4	2015	864,000	2014-15 , 118/144 : 3.6
5	2016	868,780	2015-16 , 109/140 : 3.7
6	2017	933,000	2016-17, 116/136 : 3.8
7	2018	988,980	2017-18 , 122/ 140 :3.8

Source: Researcher's Computational Representation; and Adopted from WTTC, 2012-2017, WEF, GCI and UNWTO

So that, travel and tourism destination competitiveness Index (WTTC, 2007-2017/ 18) rank of Ethiopia, was averaged only 118.33/140) destination –countries. Likewise, World Bank (2019), in its ease of doing business ranking 2020 report, Ethiopia was ranked as 159/190 countries

In fact the competitiveness measured the economic performance of Ethiopia in linkage with travel and tourism industry. As the result, the rank of Ethiopia averaged 118.33/140 from 2007 until 2017/18, reaching an all-time high of 127 in 2014 and a record low of 106 in 2012.

Fig 1: WEF data2012-2018

Actual	**Previous**	**Highest**	**Lowest**	**Dates**	**Unit Frequency**
122.00	120.00	127.00	106.00	2007 - 2018	Yearly

Source: adopted from WEF data, 2018

Furthermore, Tourist service infrastructure and major stakeholders' loose coordination in the industry, for the synchronized performance effectiveness in long-haul arrivals and mass customization tourist marketing strategy; they are the extreme factors which outweighed for untapped tourism potentials in Ethiopian according to TDC (WTTC, 2012-2017) index rank report. Thus, Ethiopia's TDC rank in Africa or in the globe hasn't been significantly improved for its trajectory tourism trade off and improved connectivity for the international tourist arrivals. Hiyab's (2017) finding also reveals that Ethiopia as a tourist destination, is less competitive and loser, in seeking global competitive advantages over its core resources mapping scores, and performance for tourist destination attractiveness against the ISO-Priority line. Recent researches (Eric, 2013; Schlumberger, 2010) on passengers' carrying capacity per year, aviation safety and air-traffic control and open skies for Africa- in implementing the Yamoussoukro decisions show that, EAL has becoming less competitive among Sub- Saharan air transport performers.

Nevertheless, EAL has been dedicated to a national flag carrier position and a pursuit of more liberal bilateral (on a reciprocal basis) contributing to becoming one of the largest and most profitable airlines in Africa (inter VISTAS, final report, July 2014), on intra-African routes with more liberal bilateral, and it is benefiting from 10-21% lower fares to 35-38% higher frequencies compared to restrictive intra-Africa routes. In fact, Gloria [9](2019) witnessed that Ethiopia's Travel and Tourism boom was one of the great success stories of 2018. In her official visit to Ethiopia, she had also remarked that, Ethiopia's Travel and Tourism had exceeded its sector's global and regional comparisons to record the highest level of growth of any other country in 2018, this was driven by the very strong performance of *aviation industry in the country and the development of Addis Ababa as a dynamic and growing regional hub*.

Therefore, the purpose of this study is to bridge the conceptual as well as empirical knowledge gaps, in which these gaps were left out by prior studies, while scholars had been up taking studies on Ethiopian Airlines contribution towards tourism destination performance effectiveness versus Travel and Tourism development in Ethiopia.

1.3 Objective

1.3.1 General Objective

The general objective of the study is to explore into Ethiopian Airline's key roles in tourism destination competitiveness: Implications for Travel and Tourism Development in Ethiopia

1.3.2 Specific objectives

1. To assess Ethiopian Airline's key roles in terms of promoting Ethiopia's *Natural and cultural world heritages* within its global-destinations ;
2. To examine the performance effectiveness of tourism destination determinant factors and indicators of Ethiopia;
3. To describe the practices of promotional strategies of Ethiopian Airlines over the tourism resources in Ethiopia ; and
4. To identify the challenges which Ethiopian Airlines encountered while it has been performing the tourism destination competitiveness

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[9]Gloria Guevara, WTTC President & CEO - WTTC is the body which represents the Travel & Tourism private sector globally. Members consist of CEOs of the world's Travel & Tourism companies, destinations, and industry organizations engaging with Travel & Tourism.

1.4 Research Questions

1. What roles can Ethiopian Airlines play in promoting Ethiopia's natural and cultural world heritages to international tourists?
2. To what extent the Ethiopian Airlines role is truly competitive to increasingly attract international visitors?
3. What types of challenges Ethiopian Airlines encountered while it is playing its key roles?

1.5. Scope of the Study

The researcher had a plan to undertake the ***cases of five stakeholder- Analyses (ECAA, EAL, Ethiopian Airports, Ministry of Culture and Tourism, and Tourism Ethiopia*)** in the thematic scope. However, the overall tourism destination competitiveness activities and Travel and Tourism industry performance of Ethiopia, is typically, rely on the forefront attributes of Ethiopian Airlines rather than others. Thus, it is believed as a crucial importance that, analyzing the attributes which qualify Ethiopia, as a destination country, has got a focus on Ethiopian ***Airline's performance,*** for its promotional role, of Ethiopian tourism resources in its global destinations, which would have been taken as an anchor for TDC rank to rest at every indicator.

Indeed, Ethiopian Airlines has been playing significantly key determinant roles, in tourism destination competitiveness positioning rank in Africa as well as in the globe. To this end, in the thematic scope, the study has focused on the key roles of Ethiopian Airlines , typically, its performance effectiveness , in tourism destination competitiveness ranks uplifting of Ethiopia , for inbound tourist arrivals to Ethiopia through its hub or gate way. But by any means it would not be limited to only these dimensions. Hence, the thematic scope encompasses **five** tourism *destination competitiveness determinate factors, and **14** indicators, to* which tourism destination competitiveness framework has been designed form the existing literature reviews therein are: Travel& Tourism Competitiveness Council Index (WTTCI) reports, from World Economic Forum (WEF) and UNWTO reports.

On the other hand, the methodological scope of the study employed both quantitative and qualitative research methods whereby case study was used as a qualitative research tool. In its temporal scope, the study design has specifically been focused on recent data collection techniques and cross-sectional observation

1.6 Significances of the Study

The study has enlightened arguable discussions on the existing literature review and the discourses which are correspondingly difficult to speak apart the contribution of Ethiopian Airline's key roles for tourism destination competitiveness, which is believed, to *impact on the travel and tourism industry GDP in general and hospitality industry employment in particular*. Keeping in mind its significance, the researcher has framed the findings to getting forwarded along with empirical implications for hospitality industry marketers, destination development managers and international tourists

Predictably, the study should motivate travel agents, Tour operators, destination managers, aviation industry participants and Travel & tourism researchers

1.7 Conceptual Frameworks and Models

1.7.1 Tourism Destination Competitiveness Models

Within this study, tourism destination competitiveness models have been assessed and categorized into ***three*** main research areas (Crouch, 2011). In the first category, there are group of models that have the aim of *diagnosing competitive positions of specific destinations*; the second group of models have focused on a *particular aspects of destination's competitiveness of the destination's positioning or management systems*; the third and the last group aggregates *general models and theories* that are not centered in specific attributes or destinations. Perhaps , the model which is categorized under the third group , as a result of a demand for wide range application models, it is the most broadly used type , with emphasis in the major works developed by Crouch and Ritchie (1999); Dwyer and Kim (2003), World Economic Forum (2007) and, recently, Sánchez and Lopéz (2015). And more recently, there are a number of studies that focus on the causal relationship to the dependent variable, factor interaction and relative weights of the different indicators in the overall tourism destination competitiveness index (Croes, 2011, Zhang et al., 2011 and Huang & Peng, 2012).

Furthermore, according to Mazanec and Ring (2011), for an index to achieve its objectives, it has to use competitiveness variables that exhibit significant relationships with tourism performance criteria. Although most tourism destination competitiveness models used in the tourism literature rest on Porter's (1980) five forces of competitiveness and Porter's (1990) diamond of national competitiveness, there is an extensive research involved both in understanding and explaining destination competitiveness and in the development and application of destination competitiveness models. Within this context, some models are strongly concentrated in the conceptual consistence of the approach such as Crouch and Ritchie (1999) and Dwyer and Kim (2003), who aim to support worldwide developments and applications, while others, were more rigid in the guidelines, point to the delivery of an annual national competitive index such as WEF (2007). To this end, tourism destination competitiveness paradigm (Ritchie and Crouch, 1993) has now widely been accepted as the most important factor determining the long term success in *destination management organizations, industries, regions and countries (Kozak and Remington, 1999).*

1.7.2. The Ritchie and Crouch's Model of TDC

According to Ritchie and Crouch (2003), tourism destination competitiveness model, the conceptual framework of TDC has about 36 attributes classified into six key factors: *core resources and attractors*, *supporting factors and resources*, *destination policy*, *planning and development*, destination management and qualifiers and amplifiers. The variables in the model explain and measure more direct and immediate impact than the macro environment elements.

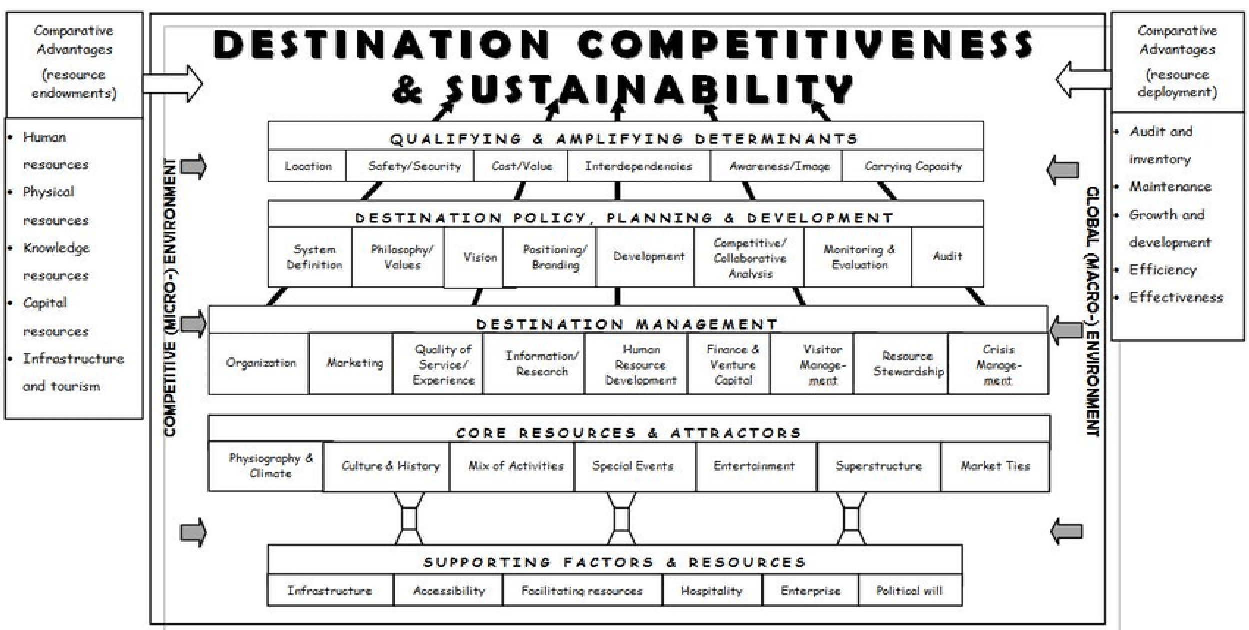


Fig 2: The Ritchie and Crouch's (2003) model was adopted for TDC

However, the model has been underlined, for its application is that, tourism destination competitiveness is not a goal in itself, but a means to achieve broader regional and national economic development (Dwyer& Kim, 2003). Based on the model, its help could specify that, if tourism destination is truly competitive when its ability is to increase tourism export, to increasingly attract visitors while providing them memorable experiences, and to do so in a profitable way, while enhancing the well-being of destination residents and preserving the natural capital of the destinations for future generations (Papp & Raffay, 2011). This issue also had been discussed by many international organizations, including the, Organization for Economic Co-operation and Development (OECD), which has defined the four majors, three additional and two groups of indicators which determine tourism destination competitiveness performance effectiveness.

Accordingly, the generic models, for many other researchers' effort, which have focused on particular aspects or dimensions been addressed rather than destination competitiveness, such as destination marketing competitive strategy (Buhalis, 2000), price competitiveness (Dwyer, Forsyth & Rao 2000a, 2000b, 2002), regional positioning competitiveness (Uysal et al., 2000), tourist service infrastructure quality management (Go & Govers 2000), nature-based tourism competitiveness (Huybers & Bennent,2003). And yet, there are still a number of difficulties in determining the constructs/determinants for measuring destination competitiveness. Of course, analytical framework has to be matching to the tourism markets development models if airline's key roles are being related to the international tourist inflows and cost resort of destinations.

1.7.3 The Dwyer and Kim's Integrated Model of TDC (2010)

Dwyer and Kim's Integrated Model of TDC had been developed in 2003, and it has had *four general attributes (factors)*: **core resources, destination management, demand conditions** and **situational conditions**. This model had come up with a brand new generic variable called "*demand conditions"* which recognizes the demand condition as an important determinant factor of TDC. It also separates between *tourism infrastructure* and *general infrastructure* which are under the label "superstructure" of the Core Resources and Attractors in the Crouch-Ritchie model.

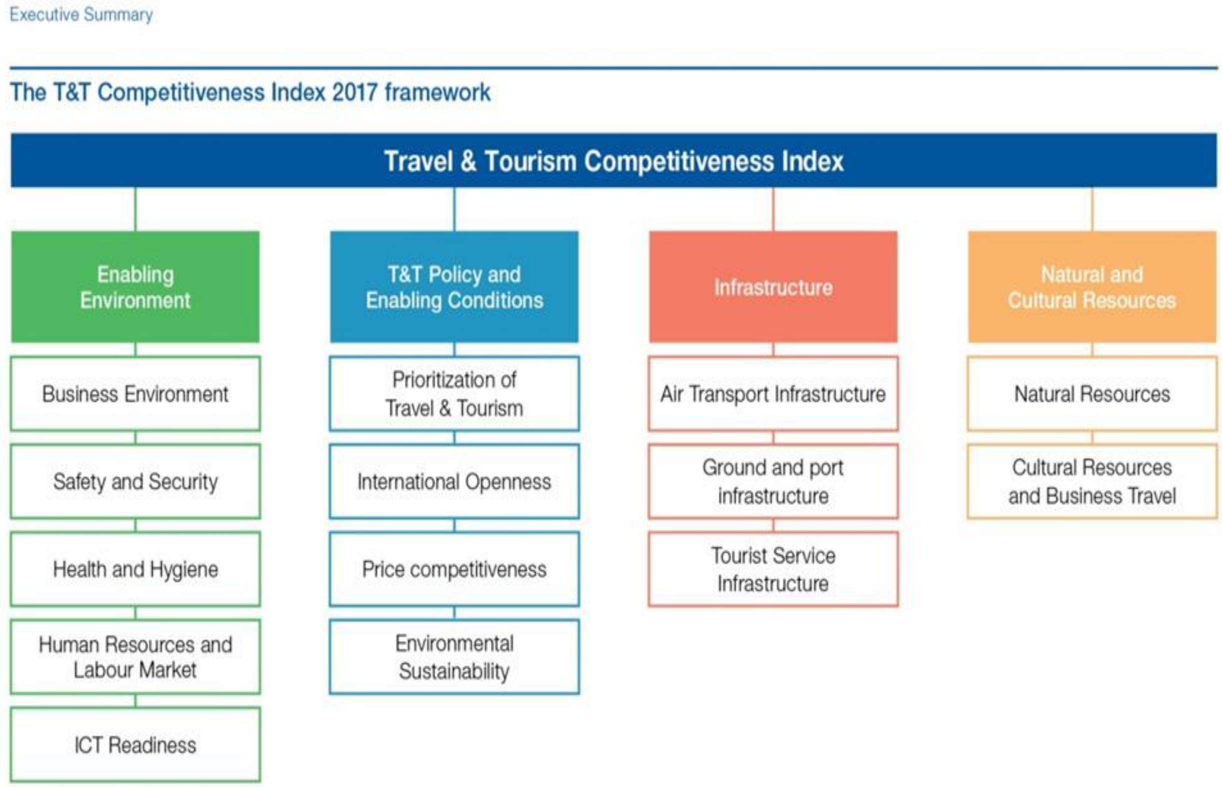
Basically, each of the two models present different perspectives of the air transport industry's (stakeholder versus Travelers; or supply side and demand condition) aspects that could be assumed to serve. However, for the purpose of this study, the researcher has adopted the *Dwyer and Kim's Integrated Model (2010); and the WEF Travel and Tourism Competitiveness Index (WTTI, 2007), for its simplicity and clarity.* The adopted model has been elaborated, for the study, by incorporating the aviation industry's key roles, on the basis of major stakeholder's interactions, with the tourism industry. The intended model was also assumed to represent (WTTC and TTCI, 2017); World Economic Forum (WEF, 2012- 2017); Tourism and Travel Competitiveness Reports (WEF, 2015, WEF, 2016, WEF, 2017); and Global Competitiveness Reports (GCR, 2015- 2018); UNDP Statistics (UNDP, 2015, 2016, 2017); Lonely Planet (LP, 2017); and Future Brand (FB, 2015, 2016, 2017).

1.7.4 The WEF Travel and Tourism Competitiveness Index[10] (TTCI)

Although World Economic Forum (WEF, 2007) has proposed, Travel and Tourism Competitiveness Index (TTCI), as a general model for ranking tourism destination competitiveness , yet it is based on *three* broad categories of variables that drive travel and tourism competitiveness: (1) *the Travel and Tourism regulatory framework sub index A*; (2) *the Travel and Tourism Business Environment and Infrastructure sub Index B;* and (3) *the Travel and Tourism human, Cultural, and Natural Resources sub index C.* These three sub-indexes comprise to total number of ***14 pillars*** of Travel and Tourism Competitiveness Index. Each of the pillars is made up of a number of individual variables. Using this index, WEF has ranked the competitive performance of 140 countries worldwide since 2007 (WEF, 2007).

[10] According to (WEF, 2007), the index is a measurement of the factors that make TDC is comprehensive in the travel and tourism industry of individual countries in a source market (**136 countries**), rather than a measure of specific country's attractiveness as a tourist destination. The WTTCI report ranks selected nations according to the Travel and Tourism Competitiveness Index (TTCI), which scores from 1 to 7, the performance of a given country in each specific sub index. The overall index is made up of three main sub-indexes: (1) regulatory framework; (2) business environment and infrastructure; and (3) human, cultural, and natural resources

Fig 3: the (WEF, 2017) Travel and Tourism Competitiveness Index (TTCI) Model adapted



Source: **Travel and Tourism Index 2017 – adopted from WEF for the study**

This adopted model is well organized, and has been undertaken throughout the study, to measure tourism destination competitiveness determinant factors and indicators of Ethiopia against source markets (measure 136/140 destinations-countries) in the global level. It comprises also fourteen pillars and five factors to be attributed within these three sub-indexes. Sub-index A: *The travel and tourism regulatory framework*; Sub-index B: *The travel and tourism business environment and infrastructure*; and Sub-index C: *The travel and tourism human, cultural and natural resources*. To this end, since 2007, the WEF has magnificently devoted into going beyond the listed indicators--- to getting developed methodologically and flexibly manage it, for the purpose of factor analysis and policy purpose, and it has been serving as a data base for the indicators set out

CHAPTER TWO

2. Related Literature Review of the Study

2.1. Definition and Concepts

In this chapter, reviews of scholarly written related literature have been presented; dictionary and operational definition of the terms and concepts are also described, and literary works which are related to the study have been reviewed in line with the travel and tourism destination determinants - measuring factors and indicators of destination competitiveness perspectives.

One of the oldest definitions which could be looked up in any dictionary to understand the tourism destination is that connected with its spatial attributes, i.e. the location and geographical scope. However, tourism scholars (Saraniemi and Kleenex, 2011) have tried to encompass and thoroughly span the multifaceted nature of the tourism destination, in order to understand an integrated approach and several perspectives of the term "**destination"**, as well as a precise clarification of the main terminology of the complex nature of the concept '***tourism destination'*** from various angles, definitions and term expressions. For example, Baerenholdt et *al*., 2004) defined as a "*tourist place*", Leiper (1990) ; Viken (2016) defined ,"*tourist attraction system",*(Butler, 1980) also defined as, *"tourism area" or "tourist district* (i.e. territorial entity, and tourist experience in a given place) , which has also physical and administrative boundaries to define its management, image, perception, market competitiveness; and it incorporates various stakeholders often including a host community , and can nest and network to form larger destinations. Similarly, Ritchie and Crouch (2000) argue that a destination is competitive if it has the ability and flexibility to meet tourist demand not on one, but on several elements of the tourism experience. Hence, destinations must ensure that their overall attractiveness and the integrity of the experiences they deliver to visitors must equal or surpass that of many alternative destinations open to potential visitors (Crouch and Ritchie, 1999 p. 139).

In brief, the term "**destination**" refers broadly to an area where tourism is relatively being performed as an important activity; and where the economy may be significantly influenced by tourism revenues. In addition, Sainaghi, (2006), further triggers different nuances in the analysis of the tourist destination, as the term 'tourism destination" has got blended heterogeneous and amalgam of definitions, functions, attributes and participants' experience.

Likewise (Cho, 2000**) defines** the concept 'tourism *destinati*on', as the place where tourists intend to spend their time away from home. This geographic unit which is being visited by tourists perhaps be a self-contained center, a village or town or a city, a region or country. It is also referred as broadly as to an area where *tourism* is relatively important for its activity and where the economy may be significantly influenced by *tourist* activities with its image and identity which may influence its market competitiveness**.**

Poon (1993) suggests that destinations need to follow four key principles in order to be competitive, namely *putting service first, making tourism a lead sector, strengthening distribution channels* and *building a dynamic private sector*, but Ritchie and Crouch (2003) argue that there are other component factors, instead of the mentioned ones, which are too broad and general to be useful, and which requires a deeper understanding of destination competitiveness. For example, competitiveness has been defined as if its ability of a destination, to maintain the market position and share and/or to improve upon them through time; and in its general concept, the tourism industry is regarded as an open system (Ritchie and Crouch, 2003), consisting of numerous diverse components, and the tourist destination might be reviewed as a mini-model of the tourism system that includes most of the system's components, but is limited to its geographical territory

In addition, tourism destination competitiveness is explained by, Porter (1985) is that, it is the search for a favorable competitive position in an industry; and it aims to establish a profitable and sustainable position against the forces that determine industry competition. Dwyer et al, (2003a), also discuss competitiveness as, the search for the forces and factors that determine the competitiveness of the tourism industry in an area that has not been fully explored. However, in the travel and tourism context, the concept of competitiveness can be applied to a different setting or context to which it can be linked to competitiveness of price, *quality of product or service*, customer *satisfaction, etc. And yet, the concept of a tourism destination* is defined by UNWTO as a physical space with or without administrative and/or analytical boundaries in which a visitor can spend an overnight; and it is the cluster (co-location) of products and services, and of activities and experiences along the tourism value chain and a basic unit of analysis of tourism.

Furthermore, the agreed definition of OECD[11] (2013) is based upon a common understanding of the key elements in defining destination competitiveness in tourism, or competitiveness for a destination, is that, it is the ability of the place to optimize its attractiveness for residents and non-residents, to deliver *quality, innovative, and attractive* (e.g. providing good value for money) tourism services to consumers and to gain market shares on the domestic and global market places, while ensuring that the available resources supporting tourism are used efficiently and in a sustainable way

Along with its concept, UNWTO also further defines the *Competitiveness of a Tourism Destination is that* ,it is the ability of the destination to use its *natural, cultural, human, man-made and capital resources efficiently* to develop and deliver quality, innovative, ethical and attractive tourism products and services in order to achieve a sustainable growth within its overall vision and strategic goals; increase the added value of the tourism sector; improve and diversify its market components and optimize its attractiveness and benefit both visitors and the local community in a sustainable perspective .And thus, it was elaborated as one of the operational definitions by the Committee on Tourism and Competitiveness (CTC) adopted by the 22nd session of the General Assembly held in Chengdu, China (11-16 September 2017).Subsequently, OECD[12] elaborated the

The definitions that have been offered in the literature review provide both a micro and a macro connotation of 'competitiveness'. From a macro perspective, competitiveness is a national concern and the ultimate goal is to improve the real income of the Nation. On that perspective, competitiveness is a very broad constructs that encompassing all social, cultural, and economic variables affecting the performance of a nation's international markets. Reflecting the macro perspective, competitiveness could be defined as that the degree to which a country can, under free and fair market conditions, produce goods and services which meet the

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Organization for Economic Co-operation and Development(OECD) - TOURISM PAPERS –INDICATORS FOR MEASURING COMPETITIVENESS IN TOURISM -©OECD

Tourism destination competitiveness determinant indicators are organized around four categories:

- Indicators measuring the tourism performance and impacts;
- Indicators monitoring the ability of a destination to deliver quality and competitive tourism services;
- Indicators monitoring the attractiveness of a destination; and
- Indicators describing policy responses and economic opportunities.

tests of international markets while simultaneously maintaining and expanding the real incomes of its people over the longer term (Global Competition: The New Reality Report on the President's Commission on Industrial Competitiveness, 1985).

Despite a voluminous literature identifying and measuring 'determinants' of destination competitiveness (Ritchie and Crouch, 2003; Dwyer and Kim, 2003), there is no consensus regarding just what destination competitiveness means, irrespective of the specific focus of the study, research in the area of destination competitiveness is bedevilled by difficulties in precisely specifying the nature of this concept which is associated with a complexity of features of *economic and non–economic, objective and subjective*. It does not seem to have been sufficiently appreciated, however, that lacks a clear meaning of destination competitiveness precludes the identification of an 'acceptable' list of determinants for any particular destination, considering these two widely accepted definitions of destination competitiveness ,Proposed by Ritchie and Crouch (2003; 2) is that *,what makes a tourism destination truly competitive? Is its ability to increase tourist export, or is it increasingly attracting visitors while providing them with satisfying, memorable experiences, and doing so in a profitable way, while enhancing the well-being of destination?*

On one hand, Gooroochurn and Sugiyarto (2005) argue that competitiveness is genuinely complex because of its disagreements frequently occur not only at the level of empirical effects and of policies, but also in the very nature of the definition of the problem. Well- intentioned and reasonable people find themselves talking at cross purposes; sometimes it almost seems they are addressing different subjects (i.e. competitiveness as if it is a complex concept that encompasses various elements that are difficult to measure). In this point, there is a good reason for the confusion---the researcher has observed that, identifying the determinant elements of competitiveness become difficult? It is because of the conceptual problems of its definition; or its relative concept whose measure depends on the choice of base *year* or *base country?* For example, Travel and Tourism Destination Competitiveness Index rank of *Ethiopia* in *2017is illustrate*
as"116th"

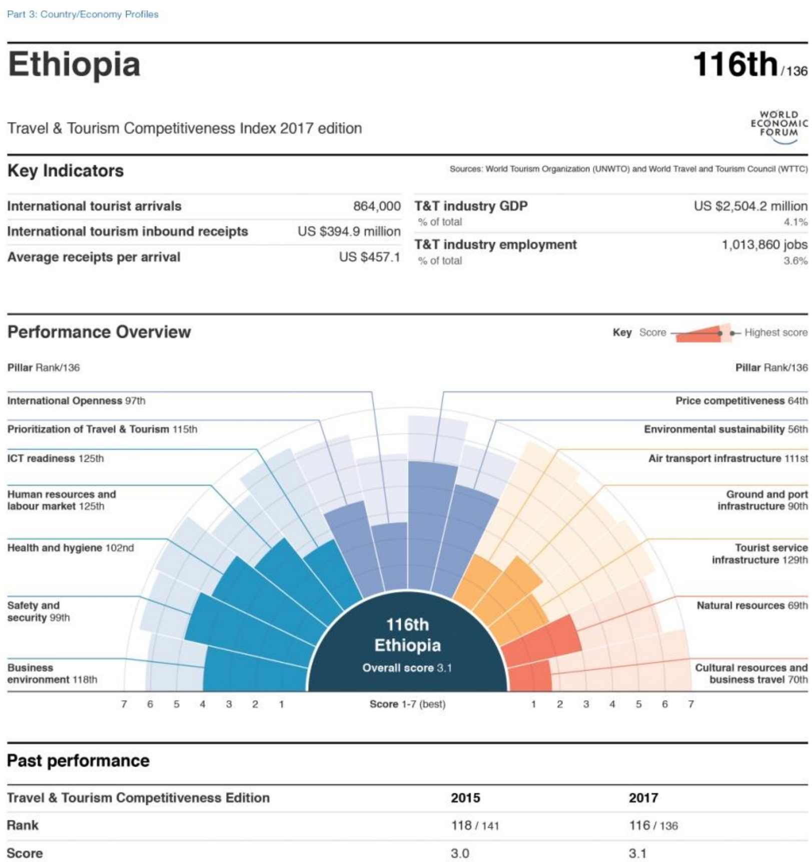

Fig 4: Travel and Tourism Destination Competitiveness Rank given to Ethiopia in 2017

This shows that the destination competitiveness was measured, its rank of country –Ethiopia, by base year. Contrast to that, for Scott and Lodge (1985), it is a multidimensional concept to which competitiveness means it requires superiority in several aspects which arises complexity from the unit factor and indicator of analysis and perspective of the analyst (Crouch and Ritchie, 1999). And yet, according to Crouch and Ritchie (1999), competitiveness is both a relative (i.e. *compared to what?)*And it is a multi-dimensional (i.e. *what are the salient attributes, determinant indicators or qualifying factors of competitiveness?*) concept.

On the other hand, Hartserre (2000: 23) underlined that the attractiveness of tourism destination competitiveness often stems from their natural resources such as their intrinsic natural beauty or the local culture combined with the man-made infrastructure that is available—including *historical, natural* and *cultural attractions* interlinked with the structure of visitors' *visit purpose in terms of length, goal of visits, hosting destination's tourism service quality,* etc. The likely nature of tourist visits in turn can be driven by the types of destination; or by the elements of systematic interlink between *destination attractiveness, a choice for mode of transportation, accommodation, safety and security, costs, purpose of the visit or integrated of local culture* that is built up of all these elements. Moreover, external factors which induce the intrinsic quality to generate synergies that stimulate demand from tourists' side and supply provision from destination competitiveness entities from tourism system.

Fig 5:Travel and Tourism destination competitiveness determinant Indicators of Ethiopia in 2017

Part 3: Country/Economy Profiles

Ethiopia

116th/136

Travel & Tourism Competitiveness Index 2017 edition

WORLD ECONOMIC FORUM

Index Component	Rank/136	Score*
Business environment	118	4.0
Property rights	88	4.0
Business impact of rules on FDI	116	3.7
Efficiency of legal framework in settling disputes	55	4.0
Efficiency of legal framework in challenging regs	53	3.7
Time required to deal with construction permits days	59	130
Cost to deal with construction permits % construction cost	131	18.7
Extent of market dominance	58	3.8
Time to start a business days	118	35.0
Cost to start a business % GNI per capita	131	69.3
Effect of taxation on incentives to work	49	4.2
Effect of taxation on incentives to invest	48	3.9
Total tax rate % profits	73	38.6
Safety and security	99	4.9
Business costs of crime and violence	90	4.1
Reliability of police services	91	3.9
Business costs of terrorism	115	4.2
Index of terrorism incidence	95	6.5
Homicide rate /100,000 pop.	103	8.0
Health and hygiene	102	4.5
Physician density /1,000 pop	133	0.0
Access to improved sanitation % pop.	126	28.0
Access to improved drinking water % pop.	130	57.3
Hospital beds /10,000 pop.	16	63.0
HIV prevalence % adult pop.	111	1.2
Malaria incidence cases/100,000 pop.	114	3919.2
Human resources and labour market	125	3.7
Primary education enrollment rate net %	120	85.8
Secondary education enrollment rate gross %	130	37.7
Extent of staff training	97	3.6
Degree of customer orientation	130	3.7
Hiring and firing practices	84	3.6
Ease of finding skilled employees	117	3.6
Ease of hiring foreign labour	102	3.7
Pay and productivity	77	3.8
Female participation in the labor force ratio to men	40	0.88
ICT readiness	125	2.6
ICT use for biz-to-biz transactions	129	3.6
Internet use for biz-to-consumer transactions	112	3.7
Internet users % pop.	126	11.6
Fixed-broadband Internet subscriptions /100 pop.	116	0.5
Mobile-cellular telephone subscriptions /100 pop.	134	42.8
Mobile-broadband subscriptions /100 pop.	134	3.7
Mobile network coverage % pop.	108	95.0
Quality of electricity supply	103	3.4
Prioritization of Travel & Tourism	115	3.6
Government prioritization of travel and tourism industry	106	3.9
T&T government expenditure % government budget	92	2.4
Effectiveness of marketing and branding to attract tourists	86	3.9
Comprehensiveness of annual T&T data 0–120 (best)	123	35
Timeliness of providing monthly/quarterly T&T data 0–21 (best)	106	10.5
Country brand strategy rating 1–10 (best)	117	58.7

Index Component	Rank/136	Score*
International Openness	97	2.6
Visa requirements 0–100 (best)	44	44.0
Openness of bilateral Air Service Agreements 0–38 (best)	52	11.6
Number of regional trade agreements in force number	127	1.0
Price competitiveness	64	4.9
Ticket taxes and airport charges 0–100 (best)	55	79.1
Hotel price index US$	94	200.9
Purchasing power parity PPP $	39	0.4
Fuel price levels US$ cents/litre	29	89.0
Environmental sustainability	56	4.2
Stringency of environmental regulations	69	4.0
Enforcement of environmental regulations	73	3.7
Sustainability of travel and tourism industry development	107	3.7
Particulate matter (2.5) concentration µg/m3	45	5.9
Environmental treaty ratification 0–27 (best)	125	16
Baseline water stress 5–0 (best)	44	0.7
Threatened species % total species	77	6.4
Forest cover change % change	31	0.0
Wastewater treatment %	111	0.0
Costal shelf fishing pressure tonnes/km2	n/a	n/a
Air transport infrastructure	111	2.0
Quality of air transport infrastructure	104	3.7
Available seat kilometres, domestic millions	51	8.5
Available seat kilometres, international millions	52	333.1
Aircraft departures /1,000 pop.	98	0.8
Airport density airports/million pop.	75	0.9
Number of operating airlines Number	120	12.0
Ground and port infrastructure	90	2.8
Quality of roads	82	3.7
Road density % total territorial area	126	-
Paved road density % total territorial area	122	-
Quality of railroad infrastructure	46	3.4
Railroad density km of roads/land area	99	0.1
Quality of port infrastructure	89	3.5
Ground transport efficiency	71	3.5
Tourist service infrastructure	129	2.2
Hotel rooms number/100 pop.	130	0.0
Quality of tourism infrastructure	106	3.9
Presence of major car rental companies	113	2
Automated teller machines number/thoudand adult pop.	135	0.5
Natural resources	69	3.0
Number of World Heritage natural sites number of sites	46	1
Total known species number of species	26	1153
Total protected areas % total territorial area	60	18.4
Natural tourism digital demand 0–100 (best)	111	2
Attractiveness of natural assets	103	4.1
Cultural resources and business travel	70	1.7
Number of World Heritage cultural sites number of sites	28	8
Oral and intangible cultural heritage number of expressions	43	3
Sports stadiums number of large stadiums	55	6.0
Number of international association meetings 3-year average	85	9.7
Cultural and entertainment tourism digital demand 0–100 (best)	93	4

* Scores are on a 1-to-7 scale unless indicated otherwise. For detailed definitions, sources, and periods, consult the interactive Country/Economy Profiles and Rankings at http://wef.ch/ttcr

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2.2. Air-Transport's Role in Tourism Destination Competitiveness

In the literature review, the researcher has undergone so far**,** air transport's role in destination competitiveness, shows that the ultimate air-transport's role is that playing the key role of *facilitation, convey tourist flows* and *extending airline networks to numerous tourist destination arrivals (*Lumsdon and Page ,2004).They have also explained that air- transport's role which could be played, from tourists perspective was that, transportation serves two key purposes are: The first is labeled as *transport for tourism* is the situation whereby transportation is only a means to an end so that it has no intrinsic value and for the tourist, it is merely an enabler: It is the economic cost that is borne by the tourist (Gray, 1966) to enable them derive utility by consuming the sought after tourism product(s). Demand for transportation therefore, is derived from the demand for the tourism products that destinations offer. On the other hand, the second purpose is that the travel itself could hold intrinsic values for the tourists, by making destination offerings, the focal element of the tourism product (Lumsdon and Page, 2004; 1982-1986).

However, Duval (2007) looks into more closely at the relationship between air transport and tourism at the destination level, a start with the larger scope of the tourism transport nexus is necessary, i.e. the role and significance of the transport system for the destination. He identified that air-transport represents the tourism system at a micro level to play the key role, of facilitation to exploring tourist destinations, in competitiveness scales or performance. In brief, Dual gives emphasis is that, developments in air- transport have a noted worthy impact on people's mobility and tourism demand. Thus, by encompassing various transportation modes, entangled networks and passenger flows to have so deeply embedded in the tourism industry that nowadays travelers cannot even decide which of them could be the primary drivers are?

Subsequently, Wittmer and Bieger (2011a) underlined in their study that although aircrafts and airports actually take the role of facilitators, and all of them are *directly connected to the process of air transportation, yet airlines have a leading role in destination competitiveness of tourist attractions through its aviation historical background and its contribution,* by leaving more secondary roles for other participants. With this regard, the ground handlers, air routes and air space configuration, national governments and institutions (regulation), air navigation services, safety and security, etc. are considered external for aviation industry even so their impact is noted as important as , so they are not considered as the core activity in destination competitiveness strategy

In like manner, according to Lamb and Davidson (1996) the quality of the transport network in place, is an important factor influencing the choice of destination and it is argued that adequate and efficient transport networks act as catalysts role in the growth and development of the destination. In return, booming destinations stimulate investment in transportation networks (Forsyth, 2006; Prideaux 2000). Conversely, inadequate transport networks deter tourists from visiting a destination which result in negative effect on its competitiveness and hinder potentials for growth. Prideaux (2000) and Page (2009) stipulate that the relationship between air-transport and tourism is more complex. To summarize, the role of air- transport versus tourism destination competitiveness , this could be reviewed from various points of view, indeed, few of their significance have been considered in this research up takings are *playing a facilitator role , conveying tourist inflows, route network expansion, foreign exchange services , tourism service infrastructure improvements, promoting endowed resources*, etc.

2.3 Aviation Industry's Regulatory Framework and Its Impact on Tourism Policy

As a matter of fact, exhaustive lists of literature, on tourism–air transport synergies, have been reviewed. In particular, it is concluded that, air transport is inherently connected with tourism, providing ground for its development. Undoubtedly both industries develop in parallel, and any events taking place in either of them have an impact on the other. In fact, Wheat croft (1998) observed that some destination countries have been enjoying a boom in foreign visitors due to strong airline's operations capacity is being coordinated within tourism industries, its compelling policy and aviation's regulatory framework balance with airline interests and tourism interests to determining their alliance. To this end, Forsyth (2010) ensures that either of them have an impact on the other and the trade-off between the airline and tourism industries

Furthermore, Papatheodorou and Zenelis (2013) discussed the historical evolution of both sectors that as if it reveals this dramatic interdependence. The demand for air- transport derives from people's desire to go somewhere in order to be engaged in spatially constrained activities (including leisure and business tourism), and conversely, transport accessibility determines, to a great extent, the demand for a tourism destination (Graham et al., 2008). Thus, these two sectors of the economy are structurally interdependent. In this regard; exploring the historical development of aviation would shed light on the parallel evolution of the tourism industry and would reveal some of the connections between them, together with the reasons behind them. In order to reveal the most important facts of aviation history, and still to adhere to the primary purpose of it; and to examine the correlation between air transport and tourism industry, to compile the essential moments of air transport evolution and show in parallel how they influenced (directly or indirectly) each other .

The result shows that contemporary and salient issues within international commercial air transport and their potential impact on global tourist flows have been revealed, where many of them can be identified, in a three pointed out -issues are: (1) Air -transport regulation impacts on tourism industry's economic growth; (2) the relationship between destinations, connectivity and airline business models (i.e. *there are four categories of airline business models: low cost carriers, charter airlines, regional carriers, and network carriers)* which are identified by Biegerand Wittmer (2006) for travelers clearly depict that how each airline model can support their motives to certain destination typologies. Thus, they placed an emphasis on how different types of airline business models lead to a difference in the traffic carried, and ipso facto to the nature of the visitor stream; and (3) the relationship between aviation-related regulatory frameworks and tourism policies.

These shape the international commercial air transport industry and, accordingly, have immense relevance to the structure and intensity of global tourist flows for several reasons. First, airlines operate between origins and destinations (and sometimes via other destinations) not only to seize commercial opportunities, but because of the respective governments are signatories to agreements or treaties which permit such commercial operations.

Second, there is a direct link between destination and transport, *which , when the latter provides access to the tourist place and is the main determinant of its accessibility attribute* because *the general assumption states that usually transport drives tourism forward, because of the chronological evolution and functional abilitie*s. However, currently, the dilemma "Transport for tourism development, or tourism for transport development?" (Duval, 2007) questions whether the dominance of transport gives rise to the rapidly growing tourism industry. From the tourist destination point of view, transport appears as both a facilitator to convey tourist flows, thus providing *accessibility* and visibility to the particular area, and as a *part of the local product*, allowing mobility and even social touch to the place.

As yet, the consequences are unknown and might be potentially uneven, thus introducing uncertainty into an already fragile sector. In this connection, Duval(2013); Forsyth (2006; 2008) discussed that air transport and tourism are mutually dependent with airlines often involved in the planning and development of tourist destinations, while tourism destinations may invest in local airports or the development of new routes (Lohmann & Vianna, 2016). Similarly, Morley (2003a) highlights that international airline alliance affect tourist destinations by influencing fares and total travel time, connectivity, and cooperative promotion

Contrast to that, Bieger and Wittmer (2006) argue that the strategic development of a destination must be connected to a clear airline policy and air access strategy. Accordingly, Bieger and Wittmer (2006: 43) concluded that the network structure of the airlines and especially the position of the country- destination's tourism policy, within these networks, can influence a market's accessibility and with this, the fare structure and the types of tourists who would have an interest, their traveling decision could be determined. They also argued that airports act as a tourism destination competitiveness determinant because of its compelling policy which would be taken into account is that with its high-quality of tourism service infrastructure (e.g., an airstrip over 3000m, easy exit and arrival services, etc.) tended to attract larger airplanes at lower frequencies. On the contrary, while smaller airports with lower quality services provision, tends to serve, to the lower network carriers and point-to-point services from low-cost carriers and charter airline suggested that the vitality of an airport largely depends on its location, infrastructure, regulatory environment, and local market. This shows that both industries strategic alliance and tourism policy implementation over TDC would be loosely interlinked.

All in, Bieger and Wittmer (2006) agreed that the regulatory strategy of aviation industry need have to link with its strategic alliance networks and tourism policy implementation match, with this framework, airlines could play a significant competitive role in extending networks of numerous tourist destinations within the country.

2.4 The Concept of Tourism Destination Competitiveness; and its Determinant Factors and Indicators

Pearce (1997 p.17) in his systematic assessment study, discussed that tourism destination's competitiveness could be more objective, for evaluation of the strengths and weaknesses of the destination, and taken for granted a better appreciation of its competitive advantage is; if it contributes a lot to the macro economic growth and the formulation of more effective tourism development policies of that specific country. Likewise, Kozak and Rimmington (1999) explained TDC as if it is a widely accepted tool that gears destination -country to forwards to the most important factor determining aspects of the long term success of the specific tourism destinations, industries, regions ; or countries .

Dwyer et al (2000:21) also argue that tourism destination competitiveness factors and indices could provide a valuable tool for policy formulation, and for destinations to achieve and maintain competitive advantage over competitors. For instance, price competitiveness is one of the TDC indices which can be used to determine the impacts of policy measures and also enable the changing sources of tourism price competitiveness to be identified and analyzed; it could provide the basis for tourist industry policy to enhance destination and it has *also implications for the direction of macroeconomic policy, industry policy, and destination marketing strategy.* More importantly, it is important to be aware of which factors are determining the competitiveness of the industry, and useful for the tourism industry growth and government to understand where a country's competitive position is weakest or strongest, how competitiveness is changing and why these changes are occurring, or reason for Patterns of change? Therefore, it examines the demand to be in lightening of changes in tourism destination competitiveness (Dwyer et al., 2000). Also, differences in customer attitudes and behavior emphasize the importance of destination management exploring the feature of each customer group, segmenting tourism markets and releasing new tourist marketing strategies that are appropriate for each market (Kozak 2000), since past research has confirmed that variables such as tourist perceptions of the country as a destination or hospitality businesses, satisfaction levels, demographic profiles and tourist activities might vary according to countries of origin, *Personal motivations and destination attributes* are ideal for destination positioning studies, by understanding the factors pushing tourists to visit a particular destination and how likely it is to be different from those of the others.

Finally, Ritchie & Crouch(2007) pointed out that, unlike descriptive analysis , conceptualizing and measuring tourism destination competitiveness perspective has motivated a number of studies, with different focuses, which have been conducted are grouped into: (1) the level of competitiveness of a specific tourism destination; (2) the specific aspects of tourism destination competitiveness determinants(factors and indicators) such as *price, quality tourist service infrastructure, destination's image, destination marketing strategy, attractiveness of natural and cultural resources, destination's performance, etc.;* (3) the development of general models and theories of tourism destination competitiveness. However, on the reality, and the researcher's argument is that, tourism destination competitiveness perspective -geographic connectivity (i.e. Unless airlines key roles have not been imbedded within strategically linked to the tourism policy implementation, or if inbound tourist's behavior is not understood), it would not be a means to maintain the TDC advantages over the competitors. or if and only if, and consequently, this could be achieved by taking into consideration, upholding different types of visitors' behavior and cost screams, to measure and rank TDC attributes whether that destination is truly competitive or not ? like manner, this could be determined by, the destination- country's tourism policy implementation and aviation's regulatory framework workability against the tourism destination performance effectiveness determining factors and indicators in place.

2.5 The challenges which Travel and Tourism Industry have been facing

This sub topic deals with issues which are enlightening to the related literature reviews which are being reviewed to the concern, and yet argued against the empirical practices and implications of the tourist destination country, on how it becoming competent in the globe or the region, with its tourism attractions (tourism determinant factors and indicators) that enables, how it ranks against its counterpart destination country. In this process, the researcher has explored into the challenges and its future prospects.

According to IATA's[13] (2017), forwarded report result to 2018, in which anticipates, opportunities and challenges that the aviation industry had addressed and the action to be taken

[13]*IATA's Industry Affairs Committee (IAC), a group of 20 airline heads of government affairs, commissioned the study with the aim of anticipating the key risks and opportunities global Commercial aviation will face between now and 2035. One of the goals of the committee was:* ***Anticipating the opportunities and challenges the aviation industry would face and take actions to address them today***

then on, as arguably addressed as the most global industries was that, international air transport faces many challenges are. For example,

> *Geopolitics to technological innovation, demographic shifts to environmental concerns, and the winds of change buffe*ting the industry *could c*ome from many directions. *Understanding the potential landscape in which airlines find themselves even in a critical situation to ensuring that aviation can grow sustainably in the future – and maximize their potential to deliver the economic and social benefits that greater connectivity brings.* The report also underlined as an issue is that, *growth in air travel is likely to be driven by domestic and regional flights in fast-developing markets in Africa and Asia rather than existing international routes. Where connectivity has been limited for decades, the pace of change is likely to increase even more dramatically. Against this, geopolitical, environmental and other challenges may slow the development of these markets, and some countries may choose to build preferential trading off relationships with states that offer infrastructure investment in return for resources, rather than using market-based criteria. This might limit the potential for intra-regional growth in airlines industry growth*.

Nonetheless, the argument which was reported by IAC, to be taken for granted in airlines industry, is likely appreciated if it would be the case. But many airline industries in developing countries, even Ethiopia Airlines, the challenges which they have been facing are; *fuel prices, air craft costs, air fare increases, less quality in tourism service infrastructure, maintenance cost and global mind set of human resource to operate the airlines business*. This in turn, has huge impact on tourism destination competiveness performance of the destination – country.

2.5.1 Regulatory Framework of Civil Aviation Industry

Travel and tourism is vital to the globalized economy. Yet, despite the importance of international aviation to the globalized economy, to the aviation industry has, historically, restrictions on foreign investment in airlines remain largely unchanged from the strict regulatory regime installed in the middle of the previous century. Under the nationality rule, most of the world's airlines are severely restricted in their ability to sell equity shares, seek investors, or to merge with other airlines. These restrictions, in turn, increase the cost of capital for airlines and deny their efficiencies of size and scope—leading to higher prices for travelers and reduced demand for travel services. Still, over the past 75 years, the aviation industry has evolved from a national transportation system to a complex global network, becoming a driver for economic growth and international trade.

This has been fuelled by technological advances, globalization and the liberalization of the industry, notably in the US and EU, which has led to open skies agreement. When air service agreements were first established in 1944, each state had its national flag carrier and international traffic rights. Yet today there are three large global airlines alliances and, according to the 2014 World Airline Ranking, the top five airline groups account for 28% of the global market share. Geographical location has also been used as a competitive advantage in creating global hubs—such as in the United Arab Emirates—to connect the East and West. While business models, technology and markets have evolved over the past 40 years, the governance of traffic rights and ownership models have remained without clear global oversight and jurisdiction, leading to international tensions. The industry and global community need to ensure that aviation remains a driver of tourism economic growth. To do so, new international routes must follow a global governance framework respected by all players without jeopardizing national security considerations. Consequently, although Africa's aviation is growing fast, but the cost of airfare is still an obstacle for many travelers to find out how African airlines are failed to addressing the problem. In addition to open-skies policies, in many cases visa policies are still very restrictive, while regional analysis highlights some of the common trends, shared strengths and weaknesses, there are, as always, large variations at the country level.

Of course, Sub-Saharan Africa remains, on aggregate, the region where Travel and Tourism competitiveness is the least developed. Although regional performance has increased, it has improved less compared to other parts of the world. Southern Africa remains the strongest sub-region, followed by Eastern Africa and then Western Africa. Yet, on average, Eastern Africa is the most improved region, while Southern Africa has experienced a slight decline. Considering the size and the rich cultural and natural resources, 29 million tourists visiting the continent in 2015 is low. From a business perspective, the untapped potential of the region could be an opportunity with expected returns potentially higher than other already mature destinations. Still, a number of conditions need to be in place to grow tourism, including the expansion of an African middle class. Despite sustained economic growth in the past decade, Africa has not seen the same kind of income increases enjoyed by Asian households. As a consequence, only a fraction of African people can afford to travel. While tourism in Europe and, more recently, Asia has been fuelled by intra-regional travel, data reveals that, on average, African tourists spend a tenth of what an overseas tourist would spend.

Air connectivity and travel cost are challenges linked to the regulatory framework. Although most African nations have signed onto the 1988 Yamoussoukro Declaration in an effort to reach a multilateral “open skies” agreement, almost thirty years later, air travel remains inefficient throughout the region. Stifled by concerns about different levels of development, protectionist fears linked to their national carriers, conflicts with competition regulations and lack of dispute settlement mechanism, mean that, to date, it is still difficult for any company to fly to new destinations. Airlines regularly need to lobby their governments to negotiate a bilateral treaty with the destination country, which can be a lengthy process. As a result, there is little competition and little connectivity. In fact, in some cases, it is faster for a passenger to fly through Europe rather than use an African hub

The likely nature of tourist visits impudence the types and the number of flight and tourist arrivals and departure times are both ensured and maintained. That means, the aviation regulation’s quality often measured in terms of their spending power is important and this links in with air transport provision. The timing and frequency of flights, together with the nature of the airlines offering services is also its concern. On the air transport supply side, the network structure of the airlines and especially the position of the destination, airport within these networks, can influence a market’s accessibility and with this the fare structure and the types of tourists who decide to travel to that destination – country’s aviation regulatory framework again halts the travel and tourism motivation of the travelers.

2.5.2 Tourism Based Service Infrastructure is becoming a Bottleneck

World economic forum along with WTTC gave emphasizes in its report (2017), for the importance of tourism service infrastructure to a nation’s travel and tourism competitiveness as a concern, is that, tourism service infrastructure has been marked out top problem in developing countries despite the travel and tourism industry has contributed 10.2% to global GDP in 2016 (WEF, 2017). This has been mentioned as an increase for the sixth consecutive year, however, private and public infrastructure investments—airport development, accommodation room stock, road and rail, and information communication technologies–have lagged behind, leading to significant bottlenecks. Such infrastructure is not only critical for the continued development of the travel and tourism industry, but also key in providing employment opportunities and regional development. Nevertheless, tourists want to move quickly and seamlessly, and would choose alternative destinations when access is difficult. For passengers, airports are a means to an end and not a destination. Therefore, airports, other tourism infrastructure and tourist destination sites need to become smarter and travel infrastructure leaner. Given changing consumer preferences and changing market demand characteristics, travel and tourism investments has to continue to evolve to ensure that they meet market needs. As such, there is a need for dialogue between the public and private investors, including airlines and airports, to ensure an integrated tourism service infrastructure strategy alignment with all stakeholders, on issues such as investment, aviation regulatory framework, political stability, safety and security and travel and tourism industry's sustainability.

2.5.3 Human Resources-- Business Dynamism and Required Talents?

World Economic Forum (WEF, 2018) along with Global Competitiveness Indicators (GCI) introduced a new methodology which emphasizing the role of human capital, which could be taken for its crucial importance to enhance travel and tourism competitiveness positioning, to score meaningful and higher degree of competitiveness in the travel and tourism industries, *is that*, the required talents of *personnel's innovation, resilience and agility* has been suggested as amendatory criteria. Otherwise, business dynamism in travel and tourism would be less competitive. It is also believed that it is the drivers force for features of economic success and travel and Tourism destination competitiveness positioning as well. To this end, Global Competitiveness Indicators(GCI, 2018), In its the most recent 2018 edition of global competitiveness indicators' result report, which used to assess 140 economies in 2018, revealed that the GCI scale was changed from *1 - 7* to *1 – 100 instead*.

2.5.4. Digitalization ,Technology Adoption and Innovation

2017 was celebrated as **"***Tourism and the Digital Transformation"—* as its theme of the world tourism day. UNWTO also called upon governments and the global community, to support digital technologies that could transform the way people travel, reduce the ecological burden of tourism and bring the benefits of tourism to all.' Dickinson et al. (2012) proposes that tourism destination today must possess digital capability. Digital capability is a cross functional proficiency in the *processes, practices* and *customer connections enabling device used by digital media and infrastructure*. There are four dimensions of utilization of digital technology: *the capability to* *provide destination information, the capability to share information, context awareness capability and tagging capability.*

The capability to share information consists of destination interpretation, provision of travel schedule, and provision of static map to relocate attraction, accommodation and tourists facilities. Sharing information capabilities must be in two ways from the destination and its stakeholders as suppliers and the tourists as customers. Through digital technology capability, the destination will obtain and manage big data which was from the past and in real time as well as prediction for facility utilization in future. Context awareness capabilities are the provision of attraction or facilities proximity, the ability to provide travel information directly (real time), and the ability to species users travel intermarries. While tagging capability is the ability to record information for travelers for future usage.

Basically, tourism and hospitality business are always confronted with new challenges and opportunities in terms of technology. The rapid rise of the importance of information and communication technology (ICT) and specifically e-business is a development that has to be taken seriously and turned into an advantage. Not only the Internet and the Web 1.0, but also Web 2.0 and the whole social media environment have had also a huge impact and change on tourism industries to a high extent (Law, Buhalis, & Cobanoglu, 2014). To this end, the net worked readiness Index 2012, shows for some sub- Saharan African countries that (i.e. ., South Africa, Ran was 1, scores: 3.58; Kenya, Ran 5, scores: 2.9; and Ethiopia, Ran 20, scores: 1.86) . The research finding shows that South Africa has been performing the highest level of capacity than others.

2.5.5 Sustainability

Despite fostering economic growth, the travel and tourism sector faces sustainability difficulties for its natural and cultural resources degradation, especially in developing countries. This in turn, negatively impacts its economic growth, and causes limitation on the travel and tourism industry, and then, it pause TDC of specific destination -country’s competitiveness rank.

Research finding shows that since 1980s, air traffic has doubled every 15 years, and the trend is continued to nearly reach ***4 billion people have already traveled*** by plane until ***2016***, this trend has just been expected to reach to***7.2*** billion by ***2035***.While the economic benefits are clear, yet measuring the net impact of travel and tourism on the environment is expected huge. Even so, growth in the number of global tourists does impact on local environments and local communities. On average, environmental performance is positive, but deforestation and habitat loss are becoming problematic in some countries.

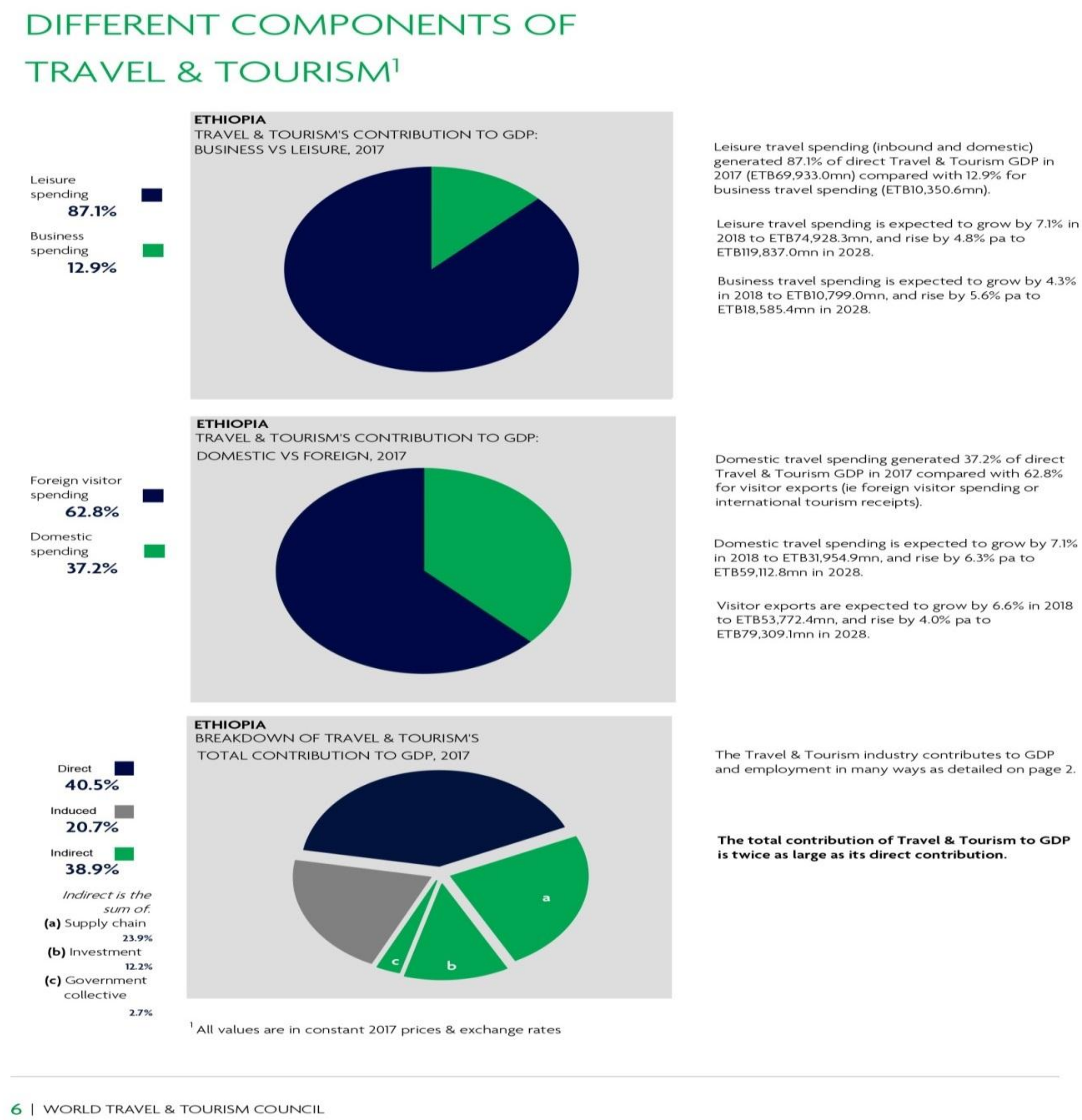
This must be mitigated to ensure the industry's long-term sustainability and contribute the fight against climate change. Areas that need to be addressed include water usage, waste generation, energy consumption and the deterioration of natural and cultural world heritage sites. Research suggests that tourists tend to consume around three to four times more water per day than permanent residents. The industry has made significant progress over the past decade in monitoring the negative impact of the industry and has developed solutions to counteract the negative environmental effects of the industry. These include improving aircraft and airport operations, as well as aircraft design and material use, and considering alternative sources of energy.

The lack in significant improvement in the use of natural resources is also hindering Africa's Travel and Tourism competitiveness. While tourism in Africa is mainly driven by natural tourism, there is ample room for improvement in protecting, valuing and communicating cultural richness. In several African countries, there are numerous cultural sites and intangible expressions that could be better leveraged and combined with the rich natural capital available; only South Africa performs above the world average. Natural resources are also unevenly protected, despite the importance of protecting the environment for African economies

The lack of competition in turn impacts the costs of tickets and airport and landing charges. Twenty of the 30 Sub-Saharan countries apply ticket taxes and airport charges above the world average. The countries that have been more active in signing bilateral agreements—*Ethiopia, Kenya and South Africa*—have been able to create strong state-owned carriers. Some countries in West Africa rely on privately owned companies, while all other African countries still maintain unprofitable, inefficient and insecure publicly-owned national companies. Recently, the five countries with strong national carriers, private operators and small state-owned operators committed to a Single African Air Transport Market that should enter into force by the end of 2017. Air transport in particular, and transport infrastructure generally, remain, to date, the biggest challenges for travel and tourism development in Africa. Compared to the 2015 edition of the TTCI, Tanzania, Uganda, Côte d'Ivoire, Gabon and Mozambique have all achieved a stronger performance, while Namibia and South Africa have lost some ground. South Africa still leads the regional ranking, taking the 53rd place globally, though the country slipped 5 places since 2015. It continues to rely on cultural resources (19th), strong natural resources (23rd), and a conducive business environment (21st), characterized by minimal red tape and modest administrative burden. Although the labor market remains inefficient (118th), there has been some progress in this area: it ranked 135th two years ago. The country has also improved price competitiveness (43rd) by reducing tickets charges, taxes and hotel prices. Despite these improvements, South Africa's tourism competitiveness has deteriorated on two elements—safety and security (120th) and environmental sustainability (117th). Fears of terrorism and an increased sense of insecurity related to crime make tourists less light-hearted about travelling in the country.

With 33 homicides per 100,000 people, South Africa has one of the worst homicide rates in the index, ranking 131st. With respect to environmental sustainability, deforestation and loss of habitat have proceeded at a rapid rate since 2000. The global interest and demand for South Africa's natural resources is increasing, but insufficient habitat preservation could prevent the country from benefitting from this growing source of tourist attraction. Another aspect that has contributed to a lower performance for South Africa this year is the reduced efforts made by the government to support the sector (59th). Although spending has remained unchanged, marketing campaigns have been perceived as effective (40th)

Finally, the Economic Development in Africa (EDA, 2017) report concluded as a matter of fact that African countries, however, face significant challenges and constraints in exploiting the potential of tourism services in trade and economic development, aims at identifying key barriers and impediments to unlocking the potential of tourism in Africa to help transform the continent's economy structurally, and provides policy recommendations on how those barriers and impediments could be addressed. The policy recommendations focus was on the following four challenges (a) Strengthening intersectional linkages; (b) Enhancing the capacity of tourism to foster more inclusive growth; (c) Tapping the potential of intraregional tourism through deepening regional integration; and (d) Harnessing peace and political stability for tourism development. Hence, this figure illustrates the recent status of Travel and Tourism in Ethiopia



DIFFERENT COMPONENTS OF TRAVEL & TOURISM[1]

ETHIOPIA
TRAVEL & TOURISM'S CONTRIBUTION TO GDP: BUSINESS VS LEISURE, 2017

Leisure travel spending (inbound and domestic) generated 87.1% of direct Travel & Tourism GDP in 2017 (ETB69,933.0mn) compared with 12.9% for business travel spending (ETB10,350.6mn).

Leisure travel spending is expected to grow by 7.1% in 2018 to ETB74,928.3mn, and rise by 4.8% pa to ETB119,837.0mn in 2028.

Business travel spending is expected to grow by 4.3% in 2018 to ETB10,799.0mn, and rise by 5.6% pa to ETB18,585.4mn in 2028.

ETHIOPIA
TRAVEL & TOURISM'S CONTRIBUTION TO GDP: DOMESTIC VS FOREIGN, 2017

Domestic travel spending generated 37.2% of direct Travel & Tourism GDP in 2017 compared with 62.8% for visitor exports (ie foreign visitor spending or international tourism receipts).

Domestic travel spending is expected to grow by 7.1% in 2018 to ETB31,954.9mn, and rise by 6.3% pa to ETB59,112.8mn in 2028.

Visitor exports are expected to grow by 6.6% in 2018 to ETB53,772.4mn, and rise by 4.0% pa to ETB79,309.1mn in 2028.

ETHIOPIA
BREAKDOWN OF TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO GDP, 2017

The Travel & Tourism industry contributes to GDP and employment in many ways as detailed on page 2.

The total contribution of Travel & Tourism to GDP is twice as large as its direct contribution.

[1] All values are in constant 2017 prices & exchange rates

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Fig 6: Percentage Components of Travel and Tourism contribution to Ethiopia's Economic Growth

CHPTER THREE

The Research Methodology

In this chapter, the detail to which the research methodology has been employed is presented. Accordingly, the research approaches, how sample size of the study was drowning; data sources; data collection tools and techniques applied to data analyses as well findings to emerge, are thoroughly described

3.1 The Research Approach

Epistemological assumptions and Pragmatic approaches were used while conceptualizing the research framework. For theoretical modeling and conceptual framework development, *deductive reasoning* was employed. According to Robson (2000), the characteristics of *deductive approach /deductive reasoning is a* concern that can be applied to develop a hypothesis (or hypotheses) based on existing theory. The *research designing* strategy is to test the hypothesis from the particular to the general. Whereas the research using an inductive approach to reasoning is likely to be particularly concerned with the context in which small sample size is used. Robson concluded his explanation of inductive reasoning is that as if the researcher might end up with the same theory, but his reasoning approach to produce theory is an inductive approach: theory follows data rather than vice versa .However, deductive reasoning approaches is concerned with deducting conclusions from premises or propositions. Deduction begins with an expected pattern that was tested against observations.

Subsequently the models which were adopted in this study were the Richie and Crouch's models, 2003; the Dwyer and Kim's integrated models, 2010; OECD, 2013; WEF, 2007; and the Travel and Tourism Competitiveness Index 2017 framework. Empirical data were collected by using survey techniques and case study as a research tool (i.e. from *Ethiopian Airlines, Ethiopian Civil Aviation Authority, Ethiopian Airports, Ministry of Culture and Tourism and Tourism Ethiopia); and from International tourists who were arrived in Ethiopia in the Months of March and April , 2019.*

3.2 The Research Design Applied

The research designs are plans in the research procedures, for the research that span the decision from broad assumptions, in which the detailed methods of data collection and analysis (Creswell, 2009) could be employed. To this end, the researcher has employed mixed methods, for the inquiries that combine or associate, both qualitative and quantitative forms. Thus, it is more than simply collecting and analyzing both kinds of data; but it involves the use of both approaches in tandem so that the overall strength of a study is assumed to be greater than simply using either qualitative or quantitative research (Creswell & Panoclark, 2007) only.

While undertaking this study--- Ethiopian Airlines role in *Tourism Destination Competitiveness*, the researcher has employed mixed method simple (quantitative and qualitative research methods). The subsequent research techniques and procedures, epistemological assumptions, as a research approach--deductive reasoning approach has been focused on its relevance, as if it was targeted, to solve its ultimate goal thereby. Likewise, the researcher also went through how data would be interpreted to obtain the findings (Crotty, 1998); this set of assumptions and well-thought-out research design constitutes was managed in the description of the research, for a credible research philosophy, which was methodologically chosen for the research strategy, data collection, data analysis and for data interpretation techniques as well as to address internal and external research validity.

This also allowed the researcher to design a coherent research methodology, in which all elements of research fit together. Johnson and Clark (2006) well noted that the philosophical commitments to which the researcher went through, choice of research strategy and its significant impact on how it is understood and to what extent the research has been investigated is explored into thoroughly.

3.3 Data Sources

Primary data was administered from firsthand .For example**,** survey questions, semi-structured interviews, in-depth interviews, interviews with Key Informants (KII), informed observations and field visits were held within the selected organizations (i.e. Ethiopian Airlines, Ethiopian Civil Aviation Authority, Ethiopian Airports; Ministry of Culture and Tourism and Tourism Ethiopia; and from International tourists) in Addis Ababa. Whereas snapshots and documentary reviews had been employed as a secondary data source during the data collection was held. In addition, archives, journals articles, websites and reports were also used as a secondary data source.

3.4 Data Collection Techniques

To administer the data collection, various data collection techniques were applied. Filled out survey questions were collected back from the respondents through electronic mails and personal contact on the spots (i.e., offices; from two targeted International Hotels- Radisson Blu and Sky light Hotels; from Museums- National Museum and Institute for Ethiopian Studies, inside Addis Ababa University; and from Bole International Air- port in Addis Ababa). These places were ideally selected to meet international tourists during survey questions which were being distributed, and to get collected the filled out survey questions.

On one hand, policy documents and strategic plans were reviewed into tourism related interlinks and their importance of interdependencies. Field observations took a number of forms. For instance, the researcher has observed the operational environments of the case studies during data administering was held (in March and April, 2019); and international tourists were being contacted face-to- face on the spots whilst collecting the filled out survey questions. It was observed that the tourists have had extensive traveling experiences in Ethiopia and elsewhere in Africa, and they have provided information about their experiences towards the cost of the travel, air -transport facility, air-ports ground handling ,safety and security; and also they have shared their live experiences in service satisfaction, visa issuing, and tourism service infrastructure quality, etc.

On the other hand, the quantitative data collection was held on the basis of the designed survey questions, which were distributed to track respondents' (International tourists, Key informants from each cases and selected participants) to rate their level of agreements, for each survey question, which was intended to determine tourism destination competitiveness ranks of Ethiopia in Africa and beyond. The survey questions which determine Ethiopian TDC position were designed to measure tourism enabling factors and attributes in a 5 point (likert, 1932; 7) scale survey with endpoints of (1) strongly disagree and (5) strongly agree . To this end, the participants responded in terms of extent on which they agreed or disagreed and this enabled the researcher to dig into the cognitive as well as the affective aspects of the respondent's attitude in the embedded matter.

The key indicators which have been developed into homogeneous group (.i.e. enabling factors and attributes in a 5 point scale to address the research objectives) were organized around those **four** categories are:

- The key indicators which are measuring the tourism performance and impacts (i.e. Air-transport services, Air transport infrastructure, Prioritization of Travel& tourism and Travel & tourism operational environment)in addition to a number of international tourist arrivals to Ethiopia;
- Indicators which are identified to determine the ability of a destination to deliver quality and competitive tourism services (i.e. Tourism service infrastructure, Human resource skills, Health and hygiene of hotel rooms & restaurants, and ICT readiness);
- Indicators which are monitoring the attractiveness of the TDC of Ethiopia (i.e. Core resources, Cultural resources and business travel, and Environmental sustainability); and
- Indicators which are describing policy responses and economic opportunities of the destination (i.e. Price competitiveness, International openness, Safety and security, Destination management and Business environment).

3.5 Sampling Techniques

3.5.1 Sample Size Determining Technique

For empirical data, survey questions were developed, on the basis of the purpose, for the study, and they were administrated from **360** international tourists who were arrived in Ethiopia in the months of *March and April, 2019;* along with **40** participants who have been working for Ethiopian Airlines and Airports, Ethiopian Civil Aviation Authority, Ministry of Culture and Tourism, and Tourism Ethiopia. *Then, random sampling technique* was employed for the investigation of valid information from the target population. Furthermore, for appropriate sample size determination, from the target population, statistical formula which was developed by Yamane (1967) was used for sample size determination. It was computed as follows:

Assumptions

A 95% confidence level, and e = ±5%

n= $\frac{N}{1+Ne^2}$was used to select appropriate size of participants in the sample.

Where, n = required sample size,

N = The population from which the sample was taken (International Tourists, who were expected to arriving in Ethiopia in the year 2019 , existing data base for international tourist arrivals in 2015,2016, 2017 and 2018 ; plus 22 staff members from ET Holidays and Ethiopian Air ports to represented Ethiopian Airlines ; 11 participants from ECAA who represented Ethiopian Civil Aviation Authority(specifically regulation directorate[14]) ;3 participants who represented research directorate of MoCT, and 4 participants who were from Tourism Ethiopia - representing markets research and public relations of the organization.

International tourists who were registered for their visit in Ethiopia in 2017, were **933, 000*** 6%) =**988,980**) source: world Tourism Organization data base (UNWTO, 31 January 2019)

2018. **988,980* 0.06**

2019. 1,048,318.8

Thus, 1,048,318.8+ 22+6+ 5+3 +4 = **1,048,358.8**

e^2 = the level of precision (Sampling error)

Hence, the required sample size was calculated as: $\frac{1{,}048{,}358.8}{1+1{,}048{,}358.8*0.0025}$= **399.8**

From the total population of **1,048,358.8** using the above formula **400** samples of respondents were selected (i.e., out of 400 samples, 360 or about 90% of the respondents were international tourists; and only 10% of them were target group- participants who were from the major stakeholders in the Travel and Tourism industry).

3.5.2 The Concept how Sample Penalty was applied

The concept of sample penalty was duly applied here as some rigidity is required that data from **399.8** should be collected excluding incomplete answers and unfilled survey questions.

[14] Aviation Regulation Directorate is one of the core areas of Ethiopian Civil Aviation Authority, which is responsible for Safety/ Security oversight functions and for economic regulations. It is headed by the Aviation Regulatory Deputy director general and it comprises:
1 .Air Transport and Planning Directorate;
2. Air Navigation Regulation Directorate;
3. Air craft Registration and Air worthiness Certification Directorate;
5. Aerodrome Safety and Standards Directorate ; and
6. Aviation Personnel and Training Organization Certification Directorate

According to James et al. (2001), it could be assumed that about 75 percent of the distributed questionnaire would be collected back. About 25% might be missing for some reasons, therefore, it was decided that 25% of 399.8 additional survey questions were distributed. Then, 25% 399.8 is 99.95 and 25% of 99.95 is 25, 25% of 25 is 6 and 25% of 6 is approximately2.Then the total number of questionnaires (400+100+25+6+2=**533**) were **533**, raised from 400 by **133** and collection was conducted up to the needed correct amount was gained. When the response rate reached100%, collection was stopped after complete **400** had been collected.

Table 3.1 the number of International Tourist Arrivals since 2012

No.	Number of International Tourist Arrivals to Ethiopia since 2012	Year of Tourist Arrivals
1.	596,341	2012
2.	681, 000	2013
3.	770,000	2014
4.	864,000	2015
5.	868,780	2016
6.	933,000	2017
7.	988,980*	2018
8.	1,048,318. 8** +40 = 1,048,358.8	2019

* 933, 000* 6% of 2017 data=988,980 in 2018

**988,980 *6% of 2018 data=1,048,318 in 2019

Source: WEF, 2012- 2017; Travel and Tourism Competitiveness Index 2017 framework; and world Tourism Organization data base (UNWTO, 31 January 2019).

Table 3.1 illustrates the number of international tourist arrivals to Ethiopia since 2012 by which the researcher uses data analysis and interpretation later on

3.6 Data Analysis Techniques

3.6.1 During data analysis, the following phases and steps were undergone. In phase one, secondary data was analyzed on the basis of survey questions and research design; Such as, Federal Democratic Republic of Ethiopian (FDRE) Constitution; Growth and Transformation Program (GTP I and II); Ministry of Culture and Tourism (MoCT) policy and strategic plan and Ethiopian Transport Policy; and Ethiopian Civil Aviation Authority's (ACAA) regulatory framework were reviewed. Subsequently, strategic plan of major stakeholders in the industry and their accomplishments, achievements and gaps were identified; and documentary analysis (Reports, Archives, etc.) was incorporated and analyzed: interpretations had been conducted. For example, one of the objectives on which analytical review was held about Ministry of Culture and Tourism of Ethiopia's (MoCT) strategic plan (2016-2020) was that?

1. To turn Ethiopia into a particular preferred top five destination in Africa in 2020
2. To increase tourist receipt from the current USD 250 million to 3 billion in 2020; and
3. To endowed Ethiopia with Tourism attraction potentials; however, the result shows that MoCT did not meet even a single objective nor it has revised its national tourism promotional strategy (For instance, there was no any effort that MoCT has exerted to establish offices where Ethiopian Embassies exist in the world unlike Ethiopian Airlines did.)

Finally, Conclusion was drowning on how *EAL has been* playing *its key* roles in Tourism destination competitiveness positioning against some other completive countries in Africa and in the globe as well. Then, the research questions which were developed on that gap were- *How the Ministry of Culture and Tourism (MoCT) has been implementing the National Tourism Policy in a synchronized way with its major stakeholders (i.e.* Ethiopian Airlines and Ethiopian Civil Aviation Authority, Ethiopian Tourism Organization, and hospitality industry*), in order to achieve Ethiopian tourism destination competitiveness positioning through EAL? And, to what extent the EAL's role is truly competitive to increasingly attract visitors, and to exploit Ethiopia's full of national tourism potentials?*

3.6.2 Phase two: On one hand, the qualitative methodology was applied (Bernard, 2000: 50-51) construct validity in the content and descriptive analysis part. And primary data-- including field observations and key informant interviews were augmented with close ended and open ended survey questions, for each case study (For instance, interview and field notes) to be interpreted as a qualitative data. In addition, semi –structured interviews were transcribed and coded to obtain the outcomes. Systematically coding and Triangulation were employed; field observations and video recordings were also transcribed into verbatim

Likewise, the quantitative empirical data analysis was conducted using various analyses techniques. For example, explanatory and confirmatory factor analysis- suggested by (Williams Brown, et al., 2010); and (Pett, Lackey et al. 2003; Swisher, Beck stead et al. 2004; Thompson 2004; Henson and Roberts, 2006) were applied. In fact, the explanatory factor which was specifically suggested by (Thompson, 2004) was employed based on the specific objectives of the study, to reduce the number of factors (variables), and to evaluate the construct validity in a survey, and to examine factors (variables) relationship within the indictors to which factor analyses techniques was employed, as an assumption and expectations based on prior models and theory about the number of constructs, and theories or models best fit. Finally, the data which were collected from the major stakeholders (participants) and international tourists were analyzed by applying statistical package **(SPSS version 25**).

CHAPTER FOUR

Data Presentation and Discussion

4.1 Introduction

This chapter presents the empirical data which has been administered from the international tourists and major stakeholders by using tables, charts and graphs. Subsequently, the analysis of the questionnaire and qualitative data interpretations for the emerging findings is followed. To this end, the result of the data analysis leads to the discussion .The qualitative data analysis takes place within the major stakeholders, in parallel to the specific objectives of the study, as it was observed. Substantially, the following sections describe data presentation, analysis and interpretation sequentially: The first part presents empirical data on the international tourist arrival (Country of origins, demographic variables and purpose of their visit). The second part presents, outputs of the empirical data analysis, the third section focuses on the discussion of the major findings and finally, summary follows.

4.1.1 Data Presentation of International Tourist Arrivals

Table 4.1.1 Country of Origins of the International Tourists who have participated in the study

Country Origins of the Tourists	Frequency	Percent
United States of America	63	17.5
Germany	40	11.1
Spain	33	9.2
France	27	7.5
Australia	22	6.1
Denmark	20	5.6
United Kingdom	18	5.0
China	14	3.9
Kenya	12	3.3
Canada	12	3.3
Ireland	11	3.1
Japan	11	3.1
Norway	10	2.8
Egypt	9	2.5
Italy	8	2.2
India	8	2.2
Holland/The Netherlands	7	1.9
Malaysia	7	1.9
North Sudan	7	1.9
New Zealand	7	1.9
Belgium	4	1.1
Mexico	4	1.1
Zambia	3	.8
Hungary	1	.3
Romania	1	.3
Comoros Island	1	.3
Total	360	100.0

Source: own survey, 2019

Table 4.1.1 illustrates that the survey question for which responses was required for country origins of the international tourists, frequency, and the percent that the respondents represent.

The survey question was also intended to explore into, to what extents EAL has been playing its key roles in onboarding and attracting international tourist inflows to Ethiopia, as it is observed while the researcher was administering the data collection*(from* **March-- April , 2019***)*. The table describes lists of countries and their corresponding percent of tourist arrivals, which is indicated according to their descending order *(i.e. United States of America* ***63(17.5%),*** *on the* *top; and German follows with,* ***40(11.1%)*** *whereas, Comoros* Islands *from Africa; Hungary and Romania from Europe* were the least ***1(0.3%)*** in tourist arrivals to Ethiopia during the observation was held. In fact 99% of the respondents (international Tourists) were arrived in Ethiopian by Air- transport from different parts of the world, while each of them were asked to respond their travel experience, level of tourism service satisfaction, their observations over their expectation to the visiting destinations within the country, however, each of the tourists has responded differently one from the other. For instance, a traveler from Norway, he explained his expectation, shortly after he got landed at Addis Ababa International Air-port said that, *"I have not visited the tourist sites yet, but I could say, unless EAL put sufficient amount of budget in the tourist service infrastructure (i.e. air-port handling system), it doesn't attract many more tourists to Ethiopia, the way Ethiopian air- port today, it won't be able to attract many tourists."*

The researcher also attempted to investigate whether the international tourist arrivals, is meant that how they were treated, or being hosted according to their demand conditions; being treated according to the purpose of their visits; and being served according to the standard level of tourism services delivery and destination offerings over their length of stay. Contrast to this, a tourist from Africa (Comoros Islands) responded that,

> *This is my first flight to Ethiopia. I haven't seen the tourist sites of Ethiopia yet; and other countries as well, and yet, I do not have different flight experiences and different Airlines services being offered to compare and contrast with EAL. Even so, I couldn't notice the service that ET has on boarded, but I can recommend that I am fully satisfied with the service offering and proud of the Ethiopian Airlines – as an African pride*

Similarly, UNWTO (2005) underlined that categories of visitor's behavior to consume destination offerings, their perspectives to evaluate tourist sites competitiveness, enabling factors and indicators, how they react to price packages and disposable expenditure over their length of stay and purpose of their visits is quite different among country of organs. That means their observation to the operational environments and tourism destination enabling factors; and their consumption behavior of the destination offerings should be oriented in line with their wants. Of course, there is an individual difference even among mass haul- arrivals. This can assist on how researcher's analysis was focused on, by and large; visitors' demand condition in line with individual differences can be also explained upon their demand conditions to which they rely on. This can be seen according to their country of origins. For example, ***63(17.5%)*** of the participants who were from United States of America, and whose drive to tourist attraction sites in Ethiopia, purpose of their visit and length of stay is different among one another ; like manner, the tourist behavior that they might have be different from tourist arrivals of African or Asian

Table 4.1.2 Geographical origins from which Inbound Tourists were arrived to Ethiopia, and their Sex categories

No.	**Contents/Country**	**Sex**		**Total**
		Male	Female	
1.	Europe	82	97	179
2.	Asia	17	23	40
3.	USA	34	30	64
4.	Africa	24	8	32
5.	Australia	9	13	22
6.	Canada	5	7	12
7.	New Zealand	2	5	7
8.	Latin America	1	3	4
	Total	**174**	**186**	**360**

Source: Own survey, 2019

Table 4.1.2 illustrates visitors' geographical origins and their sex categories

Table 4.1.3 Sex Distribution of International Tourists

Description	**Frequency**	**Valid Percent**
Female	186	51.7
Male	174	48.3
Total	**360**	100.0

Source: Own survey, 2019

Table 4.1.4. Educational Background of the Tourists

Descriptions	**Frequency**	**Valid Percent**
Bachelor degree	**119**	**33.1**
Master degree	**223**	**61.9**
PhD	**18**	**5.0**
Total	**360**	**100**

Source: Own survey, 2019

Table 4.1.4 illustrates that, on average, 223 **(61.9%) and 119 (33.1%)** respondents' educational background is *Master degree* and bachelor degree respectively. The least numb for educational status of the respondents, **18(5%),** was those who hold *PhD*. The case of educational background of international tourist arrivals entail that advanced and standardized tourism service expectation is needed to match with the hosting destination. Implicitly, this shows that upgrading their educational status is one of the requirements for international tourists upon their travel experience because of their focus on exploring into the traveling industry and to meet their ultimate goal of their visit

4.2 Framing Preliminary Findings from the Survey Data

This section frames preliminary findings from the survey data and propose the results for the further data interpretation in line with the objectives of the study by using tabulated form. And it was also intended to provoke international tourists to get responded to the survey questions, for which they were inquired, against tourism destination competitiveness enabling factors and indicators. In addition, it was designed to evaluate the TDC determinant factors and indicators of competitive performance –effectiveness. Ultimately, the questionnaires were designed to measure tourists' position over TDC determinant factors and indicators of Ethiopia.

Table 4.2.1 International Tourists' Length of stay in Ethiopia

Descriptions	Frequency	Percent	Valid Percent
less than five days	135	37.5	37.5
5-10 day	125	34.7	34.7
11-15 days	65	18.1	18.1
more than 15 days	35	9.7	9.7
Total	**360**	100.0	100.0

Source: own survey, 2019

Table 4.2.1 illustrates international tourists' length of stay in Ethiopia, and hence, the respondents were inquired for how long have they planned *to stay in Ethiopia***?** In fact, Prior's

research finding shows that base line length of stay for international tourists in Ethiopia is **1.65 days .**Likewise, the result of the data analysis reveals here, as length of stay matters, the highest percent,***135(37.5%),***for the international tourists stay in Ethiopia is *less than five days*. In fact, this study also finds out that majority of business travelers' length of stay has been identified as *less than five days; or 5-10* days in Ethiopia. But it is open for further arguments or a research undertaking that is why international tourists' length of stay in Ethiopia is limited? Is it because of the country- destination being served with less quality- tourist service infrastructure; bad destination image; or tourism demand conditions unfulfilled?

As a rule of thumb, while tourists planned to spend money, over their length of stay and purpose of visit, they expect value for money or spend fair amounts of money for fair prices of tourist services in use: For instance, for hotel rooms and restaurants, for accommodation, food, beverages and transportation, they expect to consume standardized tourism infrastructure service delivery because tourists' behavior is intended to be opportunist. Comfort is also every tourist's need at the tourist destinations. Tourists purchase goods and services accordance with their demand over the availability, accessibility and affordability in the process. Hence, financial transactions become the major practices in each tourist spot. As people move, they move with money; then they buy tourist products or service which they need on their way.

Table 4.2.2 The purpose of International Tourist visits to Ethiopia

Description	Frequency	Valid Percent
Leisure/recreational	204	56.7
Visiting Friends or Relatives	21	5.8
Business	126	35.0
Others	9	2.5
Total	360	100

Source: own survey, 2019

Table 4.2.2 illustrates the ***purpose of international visitors to Ethiopia.*** The result reflects under Table 4.2.2 is that, the purposes of visit for which international visitors have had a visit to Ethiopia is for **four** purposes: for *leisure, business, visiting friends or relatives and for othe*r (i.e. religious, transit or for unknown personal reason) purposes of circumstantial nature. On average, **204 (56.7%)** respondents were leisure travelers. This figure complements prior researches as well as WTTC Index (2017) result report on purpose of travel and tourism of Ethiopia. For example, WWTC Index (2017) result report depicts that leisure travelers accounted *87.1%* and business ones were accounted *12.9%* only.

Table 4.2.3 International tourists' preference over their length of stay

	Frequency	**Valid percent**
Reserved hotel in Addis Ababa	206	**57.2**
Outside Addis Ababa- at Tourist destination	154	42.8
Total	360	100

Source: own survey, 2019

Table 4.2.3 illustrate**s** respondents *prefer to stay over their length of stay in Ethiopia* either in reserved hotels in Addis Ababa or outside Addis Ababa. The result shows that, on average, **206 (57.2%)** of international tourists preferred to stay at their reserved hotels than any of the tourist sites in Ethiopia

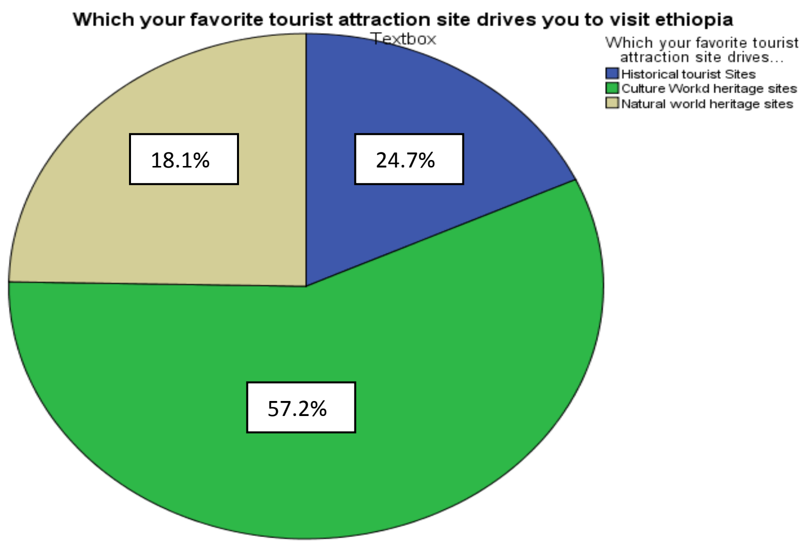
Table 4.2.4 Tourist attraction site which drives International Tourists to visit Ethiopia

Description	Frequency	Valid Percent
Historical tourist sites	65	18.1
Cultural tourist sites	206	57.2
Natural and historical world heritage sites	89	24.7
Total	360	100.0

Source: Survey data, 2019

Table 4.2.4 illustrates, respondents were inquired to respond which tourist site in Ethiopia drives each tourist to visit within the country? The highest percentage of, **206(57.2%)** international tourists were attracted to visit cultural world heritage sites of Ethiopia despite its significant disparity historical or natural tourist sites satisfies its visitors. However, the study's result shows that business travelers intended to visit cultural activities in the city than country because of their purpose of visit and the time that limits their length of stay. Contrast to factual evidence of historical tourist attraction sites in Ethiopia, very few number of, 65(18.1%) international tourists visited historical tourist sites because, out of leisure tourists who visited Ethiopia, only those who have planned to stay more than 15 days in Ethiopia, visited the Historical tourist sites of Ethiopia (i.e. Lalibela). However, Lalibela is the most tourist attraction site of Ethiopia and world heritage site as well. According to (WTTC, 2017) Index result report, Historical world heritage tourist sites, natural and cultural resources and business travel tourist sites had been ranked (69th/ 136, and 70th/136), with its overall performance position , thus, they had been scored (3.1/7 attributes) respectively by far better than other attributes from which they had been taken as enabling factors or indicators of Ethiopia's tourism destination competitiveness (i.e. Tourist service infrastructure ranked, 129th/ 136 ; ICT readiness ranked, 125th/ 136) respectively ,which used to decrease the overall performance of tourism destination competitiveness position of Ethiopia

Fig 7: Tourist Attraction sites of Ethiopia to which International Tourists were inclined to visit



Source: own survey, 2019

Table 4.2.5 Mode of Transportation

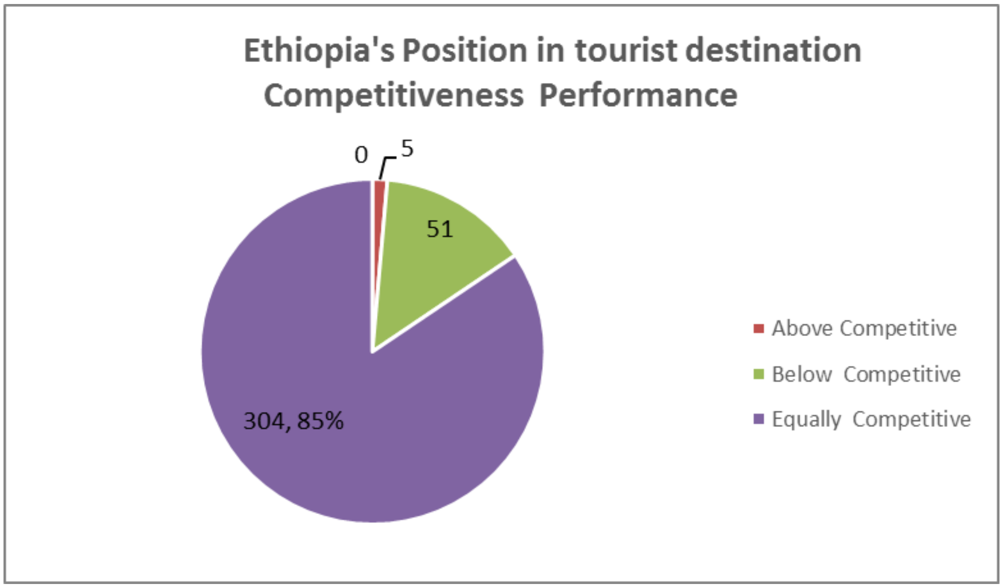
Description	Frequency	Valid Percent
Passengers' air- craft	**154**	**42.8**
Land transportation	**206**	**57.2**
Total	**360**	**100**

Source: own survey, 2019

Table 4.2.5 describes that tourists were asked to respond, which mode of transport they would use for their planned travel to one of the tourist attraction sites in Ethiopia. In the survey questions, and in the researcher's intention, to examine the respondents' presumption knowledge about EAL's key roles in facilitating their visiting plan since then they have had their journey setoff from their origin of countries, or EAL flight onboard them from country of the origins until it ends by domestic flights. The link between inbound flight with domestic entails that something that how much EAL is playing its key roles in attracting international tourist to Ethiopia was limited (i.e. visitors who used passengers aircrafts whilst they were in Ethiopia shows that insignificant, Thus, ***154(42.8%),*** compared to visitors who took land transportation ***206(57.2).*** Comparatively, the study's finding reveals that majority of visitors who were from Asia, Africa and to somehow from United States of America, stayed in their reserved hotels in Addis, and they took land transportation for their purpose of business visit instead they use the domestic flights. Besides, the length of their stay was too short to visit Historical or Natural world heritage sites within the country.

Contrast to this, Lalibela is the most tourist attraction site in Ethiopia and world heritage site as well for its **11** wonderful Rock hewn- Churches. According to (WTTC, 2017) Index result report, Historical world heritage tourist sites, Natural and cultural resources and business travel tourist sites had been ranked(69th/ 136, and 70^{th}/136), with its overall performance position , they had been scored (3.1/7 attributes) respectively by far better than other attributes from which they were compared as enabling factors or indicators of Ethiopia's tourism destination competitiveness (i.e. Tourist service infrastructure ranked, 129th/ 136 ;ICT readiness ranked, 125^{th}/ 136) respectively ,which used to limit the overall performance of tourism destination competitiveness position of Ethiopia

Fig 8: Ethiopia's position in tourist destination competitiveness performance



Source: own survey, 2019

Figure 8 illustrates that international tourists were inquired (i.e., to what extent the tourists think *Ethiopia's position, in TDC performance* **is?),** to rate Ethiopia's position in tourism destination competitiveness performance, in Africa or in the globe. Accordingly, majority of the international tourists, ***304(85%)*** rated as ***equally competitive*** as African's or the global ones do in Ethiopia; however, key indicators like tourist based service infrastructure --enabling factors and indicators, like ICT, hotel room's sanitation, road quality, and land transport accessibility were being rated *below competitive level*. Indeed, the tourist based service which uplifted tourism destination performance effectiveness in Ethiopia is the Ethiopian Airlines rigorous efforts in promoting and attracting Ethiopia's endowed resources throughout the world within its 107 destination- countries in 5 continents. This complements related literature review and the empirical data analysis. Nevertheless, according to the WEF, Ethiopia was mentioned the 122 most competitive nations in the world, out of 140 countries rank in the 2018 edition of the Global Competitiveness Index (GCI) report.

Table 4.2.6 Ethiopian Airlines Route Network -- International Destinations by Continent

Continent	Country	City
Africa	40	59
Europe	13	16
Middle East	7	9
Far East	10	15
North America	2	5
Latin America	2	3
Total	74	107

Source: Own survey data 2019, Ethiopian Aviation group

Table 4.2.6 illustrates Ethiopian Airlines route network expansion within international destinations. Thus, Africa is leading with its 40 destination- countries and 59 cities, to which Ethiopian Civil Aviation Authority has made bilateral agreements- EAL to fly over the open skies.

Table 4.2.7 Facilities Competitiveness for International Tourists

	Frequency	Percent
Yes, I agree	82	22.8
No, I do not agree	278	77.2
Total	360	100.0

Source: Own Survey, 2019

Table 4.2.7 illustrates that respondents were inquired to the survey question, ‘do you agree **facilities i**n Ethiopia are competitive for International Tourists**?’** based on the survey question, majority of the respondents, ***278(77.2%)*** agreed that facilities in Ethiopia is *not competitive for international tourists.* In fact one of the tourist service infrastructures” **is Facility,**” for which international tourists were asked to show their level of agreements. Thus, the result ensures that TDC rank of Ethiopia hasn’t shown significant improvements despite the fact that numbers of inbound tourist arrivals were increased. As a result, TTCI (WEF, 2017), ranked facility as (129th) the poorest in quality assurance, among tourism destination competitiveness’ determinant indicators in Ethiopia, as a TDC determinant factor, out of 136 source markets (136 destinations - countries).

Table 4.2.8 Hotel rooms and restaurants in Ethiopia: their competitiveness position for international tourists

	Frequency	Valid Percent
Yes, I agree	63	17.5
No, I do not agree	297	82.5
Total	360	100.0

Source: Own Survey, 2019

Table 4.2.8 illustrates, ***297(82.5%)*** respondents **didn't agree** that **hotel rooms and restaurants,** in Ethiopia, are competitive for international tourists. Likewise, international tourists who were from ***Norway*** **and** ***Spain*** also complained the hotel services that," the hotels are very expensive for low budget tourists and there were no options with different price ranges.'

However, (WEF, 2017) ranked the purchasing power parity (PPP $US) (39th); and (94th) for hotel price index out of **136** source markets (destination -countries). Hence, the purchasing power parity for international tourists, *price competitiveness*, is significantly the least in Ethiopia. Indeed, the finding shows that hotels and restaurants should improve their service quality and consider their customers' country of origins (i.e. should standardize the service or customize it); or should change their marketing strategies into internationalization points of view to sustaining and increasing the amount of exterior market; to improving the internal and external competitive level and in the end, to guaranteeing the possibility of profit maximization, and for employment opportunities (Garcia, J.M. 1996).

Table 4.2.9 Transport Accessibility and Road's Quality in Ethiopia

	Frequency	**Percent**	**Valid percent**
Yes, I Agree	85	23.6	23.6
No, I do not agree	275	76.4	76.4
Total	360	100.0	100.0

Source: **Own survey, 2019**

Table 4.2.9 describes that majority of, **275 (76.4%)** the respondents **disagreed** to the survey question, 'do you agree that **transport accessibility and road's quality** in Addis Ababa-Ethiopia are competitive for international tourists? for which it is required, their level of agreement over the transport accessibility and roads quality in Ethiopia, for international tourists. For instance, an *Australian tourist* who argued against transport accessibility and roads quality, pointed out that ,"Transport accessibility in Addis Ababa, Ethiopia is very difficult; the roads and traffic are dangerous, even very difficult to drive without guide; it is also hard to rent cars for tourists, for self-use over their stay, either"

On the other hand, the presence of major car rental companies in Ethiopia was ranked (113rd) by (WEF, 2017) out of 136 source markets, as one of TDC determinant factor of tourist service infrastructure. Thus, the result complements the priors' research findings.

Table 4.2.10 the Ssanitation / Health and hygiene in Addis Ababa, Ethiopia

	Frequency	Valid Percent
Yes, I agree	50	13.9
No, I do not agree	310	86.1
Total	360	100.0

Source: own survey, 2019

Table 4.2.10 illustrates that, **310(86.1%)** respondents **disagree** on health and hygienic access for improved sanitation in Addis Ababa, Ethiopia. The respondents were inquired to the survey question that, '*do you agree that the Sanitation / Health and hygiene is less polluted,* in Addis Ababa- Ethiopia. As a result, health and hygiene, as a TDC determinant factor or indicator, is less competitive for international tourists. The result also complements the prior's research finding, of (WEF, 2017), which was ranked as (126th) out of 136 destination countries

Table 4.2.11 Price package rating /low carrier cost

	Frequency	Valid Percent
Yes	269	74.7
No	91	25.3
Total	360	100.0

Source: Own survey, 2019

Table 4.2.11 describes, **268(74.7%**) respondents **agree** that the demand condition /price package rating for tourist services and product offerings, in Ethiopia, is competitive for international tourists. To this end, the survey question which has been designed was, 'do you *think the demand condition /price package rating for tourist services and product offerings*, in Ethiopia, is competitive for international tourist The result also complements the prior's finding of "price competitiveness" which was ranked (64th) by (WEF, 2017). In this construct, purchasing power parity (PPP) , was ranked as (39th)); fuel price leveled (29th) ; ticket taxes and airport charges was ranked as (55th) out of 136 source markets or destination -countries. Thus, the price package in Ethiopia, for which international tourists are being charged, is a competitive advantage for tourist markets making activities over other determinant factors and indicators.

Table 4.2.12: Inbound tourist's service satisfaction Evaluation

	Frequency	Valid percent
Yes	47	13.1
No	313	86.9
Total	360	100.0

Source: own survey, 2019

Table 4.2.12 illustrates, **313(86.9%)** respondents rated, **"No"** for the survey question, 'are you satisfied with **the tourist services which have been** delivered, over your stay in Addis Ababa, Ethiopia? For which the survey question required their level of agreements against tourist service deliveries effectiveness in Ethiopia; the result shows that tourism service renderings are not satisfying inbound tourists over their length of stay, in Ethiopia

Table 4.2.13 Ethiopia's Image for International Tourists

	Frequency	Percent	Valid percent
Yes	124	34.4	34.4
No	236	65.6	65.5
Total	360	100.0	100.0

Source: Own survey, 2019

Table 4.2.13 illustrates, **236(65.6%)** respondents rated, **"No".**to the survey question, **'do** you think, the destination (Ethiopia's) **country image** is attractive for international tourists?**'** The result shows that**,** Ethiopia's image for inbound tourism is not competitive (i.e. this limits the inflow of international tourists) despite it owns **Nine** *world heritage Natural and Cultural tourist sites* In like manner**,** An Australian tourist commented that, "*No*, Ethiopia's image is still suffering from the years of War and Famine. "

Table 4.2.14 Ethiopian People's Hospitality for International Tourists

	Frequency	Percent	Valid percent
Yes	324	90.0	90.0
No	36	10.0	10.0
Total	360	100.0	100.0

Source: Own survey, 2019

Table 4.2.14 illustrates majority, **324(90%)** of the respondents rated, **"Yes."** To the survey question, **'**do you think host community's (Ethiopian) **People's Hospitality** is attractive for international tourists? The finding shows that, the host people's hospitality is remarkably attractive for international tourists in addition to the resources---- world heritage sites of historical, *natural a*nd *cultural tourist sites*

Table 4.2.15 International Tourist Preferences Match

	Frequency	Valid percent
Yes, I Agree	202	56.1
No, I do not agree	158	43.9
Total	360	100.0

Source: own survey, 2019

Table 4.2.15 describes that slightly, **202(56.1%)** respondents were **agreed** to the survey question, 'do you think international **Tourist Preferences** match with, destination's (Ethiopia) offering? This shows that international tourist demand preferences slightly match with the supply side in Ethiopia.

Table 4.2.16 Country Branding and Marketing

	Frequency	Percent	Valid percent
Yes, I Agree	278	77.2	77.2
No, I do not agree	82	22.8	22.8
Total	360	100.0	100.0

Source: own survey 2019

Table 4.2.16 illustrates**,** on average, **278(77.2 %)** of respondents **agreed,** to the survey question that, **'**do you think the **country branding and marketing** is competitive for international tourists? The result shows that **country** branding and marketing is competitive for international tourists. In fact, the result of the data analysis has been triangulated with the empirical data of one of the major stakeholders (e.g. one of the key informant interviewees which was held with Zewudu[15], from ET- Holidays) verbatim during the KII. He thoroughly explained the **2035 EAL**

[15]Zewudu H. Mariam (PhD), Head, Ethiopian Holidays (One of the departments in Ethiopian Airlines). The department performs mainly **three** core aactivities: Tourist Product development, Tourist Leisure Support- promote &sell all tourist packages within **120** destinations in the globe; and the third one is Distribution) The 2nd round, KII interview was held with Dr. Zwudu,, on 8 April 2019

strategic plan, to what extents Ethiopian Airlines has been working on country branding and marketing to increasingly attract international tourists. In his explanations,

> *EAL has already achieved **2020 vision**, which was planned in 2010, to attract **1.3** million international tourist arrivals to Ethiopia by 2020. Currently, EAL has been implementing **2035** strategic plan which has **"Four"** pillars to getting implemented**. The first pillar** is Branding and Awareness rising to international tourists about Ethiopian tourist potentials and its endowed resources within its **120** worldwide destinations through conventional and digital media aggressively. In addition, we use promotional videos and Magazines in our daily flights for travelers; in our digital platforms, we are also promoting the New Brand,'* **Land of Origins** *'instead of **13 Months of Sunshine**, by inviting bloggers, travel writers and tour operators from globally known travel and Tour companies. We frequently participate in international exhibitions, trade fairs and familiarization tours which we use it for promotional strategy to make tourist marketing: feel, taste and tell the world what you have seen ways of approaching. The second **Pillar** is, tourist service infrastructure development-- it is envisioned to attract and accommodate **15 million** tourists each year by**2035**. The third **pillar** is, human resources skill development- to maintain high degree of customer orientated employees and to keep going in providing internationally recognized service- leading travel experiences, and a strong value for money proposition. The **last pillar** is creating synergy in the hospitality industry. To this end, EAL has a national growth obligation to do so because it is **a "Flag carrier Airline".** If MoCT intends to implement this strategy, perhaps it fails because it has no even a single station (destination – country) in the globe to implement the promotional work, country branding and marketing activities unlike EAL has been doing through its quite many promotional tools. To implement the strategy, budget has been also allocated (e.g. 20 million USD per year for promotional work).*

Nevertheless, **82(22.8%)** of respondents **didn't agree** the performance effectiveness of country branding and marketing of Ethiopia's tourism potentials in tourism destination competitiveness positioning. Still, the researcher has observed that despite EAL has been operating route network expansion in **107 destination- countries** throughout the world, in promoting Ethiopia's endowed resources through conventional and digital media aggressively; yet travel and tourism destination competitiveness Index (WTTC, 2012-2018) rank of *Ethiopia hasn't been significantly improved, nor Ethiopia's world heritages hadn't been well known by international tourists* in the globe. And thus, the result of the study has shown that there is a loosely created synergy - the EAL's key roles haven't been considerably interlinked within its major stakeholders' strategic plan. Ultimately, their plans were merely linked in the EAL's vision **2020.**

Table 4.2.17 Human resource skills competency

	Frequency	**Percent**	**Valid percent**
Yes, I Agree	173	48.1	48.1
No, I do not agree	187	51.9	51.9
Total	360	100.0	100.0

Source: own survey, 2019

Table 4.2.17 illustrates on average, **187(51.9)** respondents **didn't agree,** to the survey question which was designed to probe was, **"**do you agree, human resource skills competency is competitive for international tourists at the tourist service points where the employees are providing tourist services?" the result shows that, human resources skill competency is not competitive for international tourists in Addis Ababa, Ethiopia. In this point of argument, even though it is quite subjective, and yet opens for further arguments or study, the finding complements WTTC (WEF, 2017) Index result rank which was given to Ethiopia in 2017, (125th) out of 136 source markets. In this constituent, the degree of customer orientation was ranked (130th) as well. The researcher's observation on that point is that, travel and tourism industry should provide intensive staff training for improved customer orientation and skills development purpose. Because travel is not a direct demand, but it is a derived demand

Table 4.2.18 ICT readiness

	Frequency	Percent	Valid Percent
Yes, I agree	55	15.3	15.3
No ,I do not agree	305	84.7	84.7
Total	360	100.0	100.0

Source: own survey, 2019

Table 4.2.18 illustrates, majority of, **305 (84.7)** international tourists **disagree,** to the survey question, being probed was that, **"**do you agree, *Information Communication Technology* (ICT) (i.e. internet availability, automated teller machines in use, etc.) is competitive for international tourists? The finding reveals, Information Communication Technologies (ICT) service in Ethiopia is not competitive for international tourists. Furthermore, WEF, (2017) ranked as if, it was the least (125th) among TDC determinant factors and indicators of Ethiopia. In this construct, ICT use for business to business transactions being rated as (120th); internet use for business to consumer transactions had been rated(112th); and mobile-cellular telephone subscriptions in Ethiopia was ranked (115th).

Table 4.2.19 Regulatory Frame work of ECAA

	Frequency	Percent	Valid Percent
Yes, I agree	317	88.1	88.1
No, I do not agree	43	11.9	11.9
Total	360	100.0	100.0

Source: own 30.survey, 2019

Table 4.2.19 illustrates, majority of, **317(88.1**) of the respondents **agreed,** to the designed survey question to be probed was that, "do you agree that Regulatory Frame work of Ethiopian Aviation Industry's (i.e. Bilateral or multilateral agreements, route network expansion, open skies, Visa requirements etc.) *operational environment of Travel and Tourism industry of Ethiopia is competitive***?"** The result of the survey shows that regulatory framework of the destination (Ethiopia) is attractive for international tourists. The empirical data analysis result also complements(i.e. Positively correlates), the WTTC (2017) index result report for which openness of bilateral air service agreements of Ethiopian Aviation Industry was ranked as (52th) out of 136 source markets. Considerably, Ato Anmut[16] (during the key informant interview which was held, on 8 April; and 15 April 2019 at his office) has pointed out that the regulatory duties of ECAA, which all- encompassing in relation to EAL's, are extensive. And the Key roles that ECAA plays while regulating air -transport of Ethiopia is significantly recognized under, FAA and ICAO regulations like air navigation capacity and efficiency, and security and facilitation are:

- Regulate the legality of manufacturing, possession, operation, sale, import and export of any aircraft--license aviation personnel; inspect, license and regulate aerodromes;

[16]Ato Anmut Lemma. Manager; Promotion and Public Relations at Ethiopian Civil Aviation Authority(ECAA)

- Provide air traffic, navigation, and aeronautical communication and information services within and outside the Ethiopian airspace;
- License and regulate the operators of air service and general aviation services;
- Prescribe air traffic rules and standards governing the flight of aircraft;
- Register any civil aircraft and any right relating thereto; assign registration marks; issue aircraft registration certificate, issue airworthiness certificates; specify the type of service to which the aircraft is to be used; prescribe conditions as to the maintenance and repair of the aircraft, etc.

Ato Anmut also highlighted one of the regulatory roles that, "ECAA manages to control **97%** of the country's airspace and ensures reliable safety in the industry. For instance, ECAA has banned the *flight of Boeing **737** Max 8 and 9 over Ethiopian space on 14 March 2019*, On the contrary, Boeing Company has released safety issue in its report that, '*safety is at the core of who we are* at Boeing. Ensuring safe and reliable travel on our airplanes is an enduring value and our absolute commitment to everyone. Work is progressing to learn more about the Ethiopian Airlines accident and we will continue to provide updates and information on the 737 MAX 8', and yet no more reliable travel on Max 8 and 9 have been observed. Furthermore, the researcher has observed from the field visit that, there was a conducive operational environment which drives inflow of inbound tourists to Ethiopia as usual, through which Ethiopian Aviation Industry has been regulating safe and reliable travel except for the banned ones.

Table 4.2.20 Passengers' Air- crafts Quality

	Frequency	Percent	Valid Percent
Yes, I agree	327	90.8	90.8
No, I do not agree	33	9.2	9.2
Total	360	100.0	100.0

Source: own survey, 2019

Table 4.2.20 describes that majority of, 327**(90.8%)** international tourists **agreed, to** the survey question which was probed the respondents that, do you agree, the aviation industry- passengers, Aircraft quality, for Travel and Tourism development in Ethiopia is competitive? The result of the study shows that ET-passengers air craft's quality is recognized and competitive for international tourists –in the global industry of travel and tourism However, according to WEF

(2017) rank result, numbers of operating airlines were ranked as (120th): air craft departures (98th); available seat per kilometer for international flights (52th); and quality of air transport infrastructure was ranked (104th) out of 136 destination countries (source market)

Table 4.2.21 Safety and Security

	Frequency	Valid Percent
Yes, I agree	235	65.3
No, I do not agree	125	34.7
Total	360	100.0

Source: own survey, 2019

Table 4.2.21 illustrates , on average, **235 (65.3%)** international tourists rated, "**agreed"** for safety and security record of Ethiopian Aviation industry, to the survey question, they were being probed was that, "do you agree ,safety and security/air traffic control of ECAA is competitive in international Travel and Tourism standard level? The result complements the empirical data (from ECAA, Key informant interviewee) analysis where the researcher had conducted key informant interview with Ato Anmut, on 15 April 2019. He has underlined the key safety roles that, ECAA plays through air navigation services and aviation regulations in the aviation industry are identified as:

- Ensuring that aerodromes in Ethiopia offer a safe operating environment in accordance with the Convention on International Civil Aviation;
- Notifying ICAO of differences between Ethiopian national aerodrome regulations and practices vis-à-vis the SARPs contained in ICAO Annex 14.
- Carrying out aerodrome licensing/certification in accordance with Part 12 of Ethiopian Civil Aviation regulations;
- Developing and reviewing national safety standards; monitoring and ensuring adherence to aerodrome standards and recommended practices through regular safety audits and providing measures for enforcing compliance, etc.

Ato Anmut also recalled the Chicago Convention[17] (1944) to be complied , and to ensure safety and security in air- transport establishments, within the agreements which had been signed on, International Civil *Aviation* , is that," whereas the future development of international civil *aviation* can greatly --in a *safe* and orderly manner and that international *air transport* services to get safely operated.

Table 4.2.22 Political stability of Ethiopia for International Visitors

	Frequency	Percent	Valid Percent
Yes, I agree	81	22.5	22.5
No, I do not agree	279	77.5	77.5
Total	360	100.0	100.0

Source: own survey, 2019

Table 4.2.22 illustrates, on average, **279 (77.5%)** of international tourists **disagreed,** to the survey question being probed that, **"**do you agree, the Political stability of Ethiopia is competitive for international Travel and Tourism service? The result of the survey shows that the political stability of Ethiopia is unattractive for international tourists. Specifically, they have figured out the mass violence which had been happening since 2015 throughout the country. Contrast to this, **81(22.5%)** of the respondents strongly argue for the destination's (Ethiopia) political stability, for which, they argue for was that, the number of international tourist arrivals

[17]ONVENTION ON INTERNATIONAL CIVIL AVIATION, SIGNED AT CHICAGO, ON 7 DECEMBER 1944 (CHICAGO CONVENTION)
WHEREAS the future development of international civil aviation can greatly help to create and preserve friendship and understanding among the nations and peoples of the world, yet its abuse can become a threat to the general security; and
WHEREAS it is desirable to avoid friction and to promote that cooperation between nations and peoples upon which the peace of the world depends;

THEREFORE, the undersigned governments having agreed on certain principles and arrangements in order that international civil aviation may be developed in a safe and orderly manner and that international air transport services may be established on the basis of equality of opportunity and operated soundly and economically;
Have accordingly concluded this Convention to that end

have been increasing since 2015 as an evidence. While it is a point of departure, the researcher's observation is that, there has been great deal of negative economic impacts on travel and tourism industry in general and hospitality industry in particular. And yet, it is also open for arguments, or to be taking away for further research undertakings.

Table 4.2.23 International tourist's observation within host country's Economic growth

	Frequency	Valid Percent
Yes, I agree	197	54.7
No, I do not agree	163	45.3
Total	360	100.0

Source: Own Survey data, 2019

Table 4.2.23 illustrates, **197(54.7%)** of the international tourists **agreed,** to the survey question being probed that**,** "Do you agree, the **Economic growth** of Ethiopia is competitive in Travel and Tourism industry for international tourists? The result shows that the host country's economic growth is slightly attractive for international tourist arrivals. At times, travel and tourism industry, in Ethiopia, will have opportunity to improve tourism destination competitiveness positioning.

Table 4.2.24 Tourist Service Provision Competitiveness

	Frequency	Valid Percent
Yes, I agree	159	44.2
No, I do not agree	201	55.8
Total	360	100.0

Source: own survey, 2019

Table4.2.24 illustrates, on average, **201(55.8%)** of international tourists **agree**d that tourist service provision is slightly attractive for international tourist arrivals in Ethiopia.

Table 4.2.25 Prioritization of Travel and Tourism in a destination - country

Descriptions	Frequency	Valid Percent
Above Competitive level	11	3.1
Below Competitive level	157	43.6
Medium in Competitive level	192	53.3
Total	360	100.0

Source: own survey: 2019

Table 4.2.25 illustrates, to what extents, international tourists react to the survey question, **"to** what extents do you level**, the host country's** TDC determinant factors performance effectiveness is competitive in Ethiopian travel and Tourism Development? "Basically, Prioritization indicates the government's commitment in giving special attention to expenses or budget allocation for improving tourism service infrastructure, safety and security, and working for political stability and peace: ultimately government's commitment for travel and tourism sustainability. While TDC performance effectiveness observed, in the destination (Ethiopia), on average, **192(53.3%)** respondents or international tourist have rated ***medium in competitive level.*** In fact, the result of the analysis, prioritization for travel and tourism in Ethiopia shows that, it is slightly attractive. On the contrary, TDC determinant factors and its respective indicators, according to (WEF, 2017) result rank, which was measured to evaluate their performance effectiveness, by WEF in 2017, out of 136 source markets, show that prioritization of travel and tourism of the destination (Ethiopia) was ranked as (115th), below competitive. In this constituent, government's prioritization on travel and tourism was ranked (106th); government's budget or expenditure for travel and tourism was ranked (92th); effectiveness of tourist marketing and country brand strategy rating was ranked as (86^{th}); efficiency of legal framework in challenging TDC (53th); extent of travel and tourism market dominance was ranked (58th); Business impact of rules on FDI was ranked (116th); index of terrorism incidences was ranked (95^{th}); comprehensiveness of annual travel and tourism data was ranked (123th) ; and timeliness of providing monthly or quarterly travel and tourism data was ranked (106^{th}) out of 136 source markets or destination countries

4.3 Analyses Categorized based on Informants

Table 4.3.1 Major stakeholder's' responses on the bases of iinformants - Endowed Resources

	Strongly disagree		Disagree		Neutral		Agree		Strongly agree	
Indicators	C	R%	C	R%	C	R%	C	R%	C	R%
4.3.1.1 Natural attractions							**7**	**17.5**	**33**	**82.5**
4.3.1.2 cultural attractions			**3**	**7.5**					**37**	**92.5**
4.3.1.3 Natural world heritage sites							**3**	**7.5**	**37**	**92.5**
4.3.1.4 Historical world heritage			**3**	**7.5**					**37**	**92.5**

Source: own survey, 2019

Table 4.3.1 describes, on average, **36(90 %)** respondents were **strongly agreed,** to the survey question being probed was that**, "to** *what extents do you agree to the TDC determinant factor: endowed resources of Ethiopia. Are these lists of indicators competitively attracting international tourists?" In this constituent,* Tourism enabling factor like, endowed *resources of Ethiopia,* and the respective indicators (i.e. Historical, Natural, and Cultural attractions and world heritage tourist sites) of Ethiopia are in a competitive position compared to some other tourism destination competitiveness determinant factors and indicators in Ethiopia.

Like manner, according to WTTC(2017) index result report, number of world heritage natural sites had been ranked as (46); total known species was ranked(26); total protected areas against percent of total territorial area in the country was ranked as (60); environmental sustainability was ranked (56) ;attractiveness of natural assets was ranked (103); and sustainability of travel and tourism industry development was ranked (107) out of 136 source markets or destination countries. Unlike tourist service infrastructure, sanitation or hygiene and land transportation accessibility, according to the participants' level of agreements, to which they were enquired to rate, the aggregate result of the endowed resources for TDC in Ethiopia is relatively attractive for international tourist inflows to the country.

In fact the result shows, considerably the cultural attractions, natural world heritage sites and historical world heritage sites prevailed over, **37(92.2%),** the TDC determinant indicator- natural attractions, **33(82.5%)**as a homogeneous group formed with variables solidly correlated to each other and independent from the rest(Hair et al., 2006).

Table 4.3.2 Major stakeholders' responses on TDC determinant factor – tourism enabling service infrastructure and Amenities

	Strongly disagree		Disagree		Neutral		Agree		Strongly agree	
Indicators	C	R%	C	R%	C	R%	C	R%	C	R%
4.3.2.1 Facilities			**36**	**90**	**4**	**10**				
4.3.2.2 Hotel rooms & restaurants			**15**	**37.5**	**2**	**5**	**20**	**50**		
4.3.2.3 Land Transportation Accessibility			**22**	**55**	**7**	**17.5**	**11**	**27.5**		
4.3.2.4 Sanitation or Hygiene			**38**	**95**	**2**	**5**				
4.3.2.5 less Polluted	**3**	**7.5**	**33**	**82.5**	**4**	**10**				

Source: own survey, 2019

Table 4.3.2 describes, on average, **38(95%)** ; **36(90) ; and22(55 %)** respondents were **disagreed,** to the survey question **,"** *to what extents, do you agree to the TDC determinant factor* - ***tourism service infrastructure*** *and Amenities of Ethiopia, Are these lists of indicators competitively attracting international tourists?"* TDC determinant indicators like Heath & hygiene, Facilities and *land transportation accessibility*, *Ethiopia as a destination country*, *amenities and services*, which had been expected for being less polluted, the result shows that they are not competitively attracting international tourists. However, a few, **20 (50%)** respondents were **agreed** on, *hotel rooms and restaurants to be standardized for international tourists*. Indeed, international tourists have also complained that those determinant indicators of TDC of Ethiopia have had limitations for their level of competitiveness

Table 4.3.3 Major stakeholders' level of agreements on TDC determinant factor: Tourist demand conditions to visiting Ethiopia

	Strongly disagree		Disagree		Neutral		Agree		Strongly agree	
Indicators	C	R%	C	R%	C	R%	C	R%	C	R%
4.**3.3.1** Price charging for international tourists							**40**	**100**		
4. **3.3.2** Air crafts quality							**40**	**100**		
4.**3.3.3** Ethiopia as a tourist destination preference					**3**	**7.5**	**26**	**65**	**11**	**27.5**
4.3.3.4 People's Hospitality / customer care							**40**	**100**		
4.**3.3.5** Tourism based Service Satisfaction							**40**	**100**		

Source: own survey, 2019

Table 4.3.3 illustrates that all, **40(100%)** participants have shown their level of agreements '**Strongly agree'** to the survey question, "*do you agree to the* TDC determinant factor **-**Tourist **demand conditions** to visiting Ethiopia**.** *Are these lists of indicators competitively attracting international tourists?* TDC determinant indicators like *Ethiopian people's hospitality or customer care, tourism based service satisfaction, air crafts quality and price packages for international tourists.* However, few participants, **3(7.5%)** have shown their level of agreements' **Neutral**" to the survey question on TDC determinate indicator: Ethiopia attracts international tourists preferably than destination countries in Africa or in the globe.

Table 4.3.4 Major stakeholders' level of agreements on TDC determinant factor: Destinations Management

	Strongly disagree		Disagree		Neutral		Agree		Strongly agree	
Indicators	C	R%	C	R%	C	R%	C	R%	C	R%
4.3.4.1 Country Branding & its image for international tourists					**7**	**17.5**	**33**	**82.5**		
4.3.4.2 Human resources competency while serving international tourists					**7**	**17.5**	**33**	**82.5**		
4.3.4.3 Ethiopian Airlines tourism strategic plan			**3**	**7.5**			**37**	**92.5**		

Source: Own survey, 2019

Table 4.3.4 describes, on average, **34.3(85.8%)** participants have been **agreed,** to the survey question that, "to *what extents do you agree, the* TDC determinant factor - **destinations management** of Ethiopia, *are these lists of indicators competitively managed to attract international tourists?* TDC determinant factor and its respective indicators, for which they have shown their level of agreements, like *Ethiopian Airlines tourism strategic plan, country's image for international tourists, and human resource skills while serving international tourist*s at the destinations being leveled as competitive. This means, they were agreed that TDC determinant indicators which are listed under table 4. 3.4 have been managed competitively for international tourist.

Table 4.3.5 Major stakeholders' responses, on TDC determinant factor: Ethiopia's Travel and Tourism Operational Environment

	Strongly disagree		Disagree		Neutral		Agree		Strongly agree	
Indicators	C	R%	C	R%	C	R%	C	R%	C	R%
4.3..5.1 Regulatory frame work of ECAA					**4**	**10**	**33**	**82.5**	**3**	**7.5**
4.3.5.2 Government's commitment to invest on travel and tourism service infrastructure					**4**	**10**	**22**	**55**	**14**	**35**
4.3.5.3 ICT readiness			**37**	**92.5**			**3**	**7.5**		
4.3. 5.4 Safety and security							**26**	**65**	**14**	**35**
4.3.5.5 Political stability			**3**	**7.5**	**22**	**55.0**	**15**	**37.5**		

Source: Own survey, 2019

Table 4.3.5 illustrates that except Information Communication Technology (ICT) application; to which majority of, **37(92.5 %)** participants have rated **disagreed** to the survey question which was used to probe , "to *what extents, do agree to the* TDC determinant factor - **destination country's operational environment**, *are these lists of indicators competitively attracting international tourists?* To their level of agreements, and yet on average, **21 (52.5%)** participants **agreed** that the operational environment of travel and tourism of Ethiopia is competitive for international tourists. Nevertheless, political stability of Ethiopia, for some, **22(55**%) participants were *Neutral* to respond to political stability in the country.

Indeed, admittedly, **33(82.5%)** participants were agreed that, one of the TDC indicators, '**Regulatory frame work of ECAA**" is the core activity of the aviation industry of Ethiopia, and thus, has significance impacts on the Ethiopian airlines key roles and in a travel and tourism operational environment as well; or it is significantly competitive in Africa and in the globe.

4.4 Discussion

This section discus what the results mean, on which findings have been emerged from the data analysis of the survey, *based on the specific objectives of the study*. Specifically, important constructs of TDC determinant factors and indicators' performance effectiveness of Ethiopia, as a destination, is presented for discussion, compared to African destinations or the global ones as the source markets. In this connection, findings for Ethiopian Airlines key roles, in tourism destination competitiveness, can be explored from the discussion.

In many instances, the researcher has employed ordinary indicator measures or nonmetric data analysis methodologies (i.e. Nominal scales, ordinal scales and frequency description), instead of employing multiple discriminatory analysis and logistic regression to be used to indicate mean value for each indicator. However, the implication for which the study has employed was substantial. Because (Hair et al., 2006) underlined that multivariate are devised solely to deal with nonmetric data analysis (i.e. *Exploratory Factor Analysis*, *Nonmetric correspondence analysis*, *factor analysis* ***or*** *confirmatory factor analysis*), to this effect, the factors were taken as homogeneous groups framed with variables solidly correlated to each other and independent from the rest.

Thus, it is an appropriate technique the researcher has applied to ensure that they are used appropriately to indicate their relationships to which they have been developed through multi-item scales for each construct (factor), by assessing each of the relationships simultaneously rather than in a separate analysis. Hence, the average percentage of the variance which was extracted from the TDC determinant factor is a specific confirmatory testing for the convergent validity. Then, the factor analysis provided thereby is the transition for the applications of interdependence (e.g., classification of statistical techniques in which the variables are not divided into dependent and independent sets; rather, all variables are analyzed as a homogeneous set within the factor) techniques to the formulation, estimation, and interpretation of multivariate results.

Exploratory Factor Analysis versus ***Confirmatory Factor Analysis*** (Williams, Brown et al. 2010) while the researcher has no expectations to the number or nature of the factors, is used. As the title suggests, this allowed the investigator to explore the main variables to create theory, or model from a relatively large set of latent dimensions often represented by a set of items (Pett, Lackey et al. 2003; Swisher, Beckstead et al. 2004;Thompson 2004; Henson and Roberts 2006).Whereas, confirmatory factor analysis, it is a form of structural equation modeling, was applied to test the proposed theory or model , in contrast to explanatory factor analysis, it has assumptions and expectations based on prior model and theory about the number of constructs, and which construct theories or models best fit (Williams, Brown et al. 2010). Although both EFA and CFA methods tried to account for as much variance as possible in a set of observed variables with a smaller set of latent variables, factors, or components. Despite exploratory factor analysis being apparently complex statistical method, the approach taken in this analysis was sequential and linear, involving typical options (Thompson 2004), which was employed, based on the specific objectives of the study, reduction of number of factors (variables) had been done for evaluation of construct validity in a survey; and examination of factors (variables) relationship within the indictors was employed in the factor analyses as well.

To illustrate again, indicators are the specific items or attributes of measurement while constructs are the generic predictors or TDC determinant factors that summed up similar items together (i.e. *Endowed resources*, *tourism service infrastructure*, *Travel and Tourism policy and enabling factors*, etc.), in which all the variables are analyzed simultaneously in an effort to find an underlying structure to the entire set of variables or subjects. In addition, according to (Fabrigar, Wegener et al. (1999), the following four methodological issues that the researcher has considered were employed for data analysis techniques.

As a result, emerging findings suggests that key indicators which had been developed into homogeneous group, to address the research objectives in the study; and which were being organized for the analysis purpose around those **four** categories , meant that,

- The key indicators which are measuring the tourism performance and impacts are(i.e. Air- transport services, Air transport infrastructure, Prioritization of Travel& tourism and Travel & tourism operational environment)in addition to a number of international tourist arrivals to Ethiopia;
- Indicators which are identified to determine the ability of a destination to deliver quality and competitive tourism services are (i.e. Tourism service infrastructure, Human resource skills, Health and hygiene of hotel rooms & restaurants and ICT readiness);

- Indicators which are monitoring the attractiveness of the TDC of Ethiopia are (i.e. Core resources, Cultural resources and business travel, and Environmental sustainability); and
- Indicators which are describing policy responses and economic opportunities of the destination are (i.e. Price competitiveness, International openness, Safety and security, Destination management and Business environment).

However, the actual constructs (Factors) which were taken into accounts in this study, for the analysis were: *Core resources and attraction, Tourism enabling service infrastructure, Tourist demand conditions, Destination management,* and *Travel and Tourism operational environment rather than these four factors- which were identified as the emerging findings in this study.*

Prior to making the analysis, it was found critical that to study Ethiopia's TDC determinant factors and indicators ranks which were given by WTTCI, WEF, GCI and UNWTO. Hence, identifying permanently dominant key indicators and substantial tourism attractions for which Ethiopian Airlines has been playing its key roles in facilitating and attracting international tourist inflows to Ethiopia is a crucial issue rather than the total respondents as their sample size was marginally less to represent over all international tourist arrivals in that context. It also makes much more sense to present about the substantial travel and tourism destination competitiveness (WTTC, 2017) index result report against Ethiopia rather than presenting the empirical data analysis first, and yet for analytical understanding purpose, comparison between prior ranks and empirical data analysis was presented.

In fact, WTTC (2017) had specifically identified key indicators in travel and tourism destination competitiveness in its edition 2017 was that, international *tourist arrival* was marked as *the first key indicator* of Travel & Tourism competitiveness, which in turn, measures the Travel and Tourism industry GDP of the total percent, for individual source market or destination country. For example, the number of tourist arrivals to Ethiopia in 2015 was reported as 864,000; and contributed US$ 2,504.2 million and 4.1% of total travel and tourism. Similarly, *international tourism inbound receipts* was marked as *the second key indicator* in travel and tourism competitiveness. Which contributed US$ 394.9 million, and percent of total travel and tourism inbound employment of 1,013, 860 jobs. The *third marked* key indicator for travel and tourism destination competitiveness was *average receipt per arrival*. This has contributed US$ 457.1, total percent of 3.6% in travel and tourism industry. It is illustrated in the tale 4.4.1

Table 4.4.1 Travel & Tourism Industry GDP%; and its Contribution to destination competitiveness' rank, compared to some African destination - countries

Key indicators	Ethiopia's Rank 2017(116/136)	Kenya's 2017(80/136)	South Africa's 2017(53/136)
International tourist arrivals	864000 T&T industry GDP% us$25042.2 million ,4.1%	1114100 T&T industry GDP% us$2296.0 million ,3.9%	8903773 T&T industry GDP% us$9339.9million, 3.0%
International tourism inbound receipts	Us$394.9 million T&T industry employment 1013860 jobs 3.6%	Us$723.0 million T&T industry employment 592300 jobs 3.5%	Us$8234.7 million T&T industry employment 702824 jobs 4.5%
Average receipts per arrival	Us$457.1	Us$649.0	Us$924.9

Source: Researcher's computational representation, and it is adopted from WTTC, 2017, for illustration

On one hand, travel and tourism competitiveness performance effectiveness was reported as pillar rank/136 source markets. Within that category, TDC determinant indicators of Ethiopia were ranked as: International openness was ranked (97th), Prioritization of travel and tourism (115th), ICT readiness was ranked (125th), Human resources and labor market was ranked (125th), Health and hygiene was ranked (102nd), Safety and security (99th); and Business environment was ranked (118th). Likewise, over all scores of the travel and tourism competitiveness was ranked 116th /136 destination countries. Ethiopia's overall score in WTTC (2017) index result was 3.1/7; and was ranked 116th/136. Key score was also ranked from the pillars like Price competitiveness (64th), Environmental sustainability (56th), and Air-transport infrastructure was ranked as (111st), Ground handling of airport (90th), Tourism service infrastructure (129th), National resources (69th) and Cultural resources and business travel was ranked as (70th).To this end, in 2015, performance effectiveness of Travel and tourism competitiveness was ranked 118th/ 141, and scored as 3.0

Similarly, within four years data (2006 to 2009) about historical inbound tourist arrivals to Ethiopia, of the ministry of culture and tourism unpublished bulletin has shown that, the tourist – arrivals from different regions of the world was computed therein, subsequently, Africa with leading countries were Kenya, Sudan, and Nigeria, on average 33% of the total inbound tourists have had a tour to Ethiopia. From Europe, UK, Germany and Italy were leading countries which took 26%; and United States of America and Canada took 20% followed by Middle East with leading countries of Saudi Arabia, UAE and Yemen which took 10%of the total inbound tourist-arrivals to Ethiopia. From Asia the leading countries were China and India which took 10%, and from Oceania the leading country was Australia which was taking 1% of the total inbound tourist- arrival to Ethiopia. In like manner, the result of empirical data analysis has shown that United States of America was with the leading position (63%), Germany follows the lead with (40%) from Europe; and Kenya has taken the highest position (12%) from Africa, of the total inbound tourist arrivals to Ethiopia in (March and April,2019).

On the other hand, in Travel and tourism destination competitiveness (WTTC, 2017/ 18) index rank, Spain attained the 1st place globally in the global Travel and Tourism competitiveness index for the second time. Spain's success could be attributed to its unique of four of both cultural (2nd) and natural (9th) resources, combined with sound tourism service infrastructure (2nd), air transport connectivity (9th) and strong policy support (5th). Spain's Travel and Tourism industry has been connected from the recent ease of its fiscal policy and by the redirected tourism from Middle East and parts of Western Europe affected by security concerns. Those challenges in travel and tourism developments, however, did not take anything away from Spain's ability to provide an excellent environment for the Travel Tourism sector to flourish.

Although the challenges which Spain had faced thereby, yet it was used as an opportunity to continue to find ways to improve, given the sector's maturity. While Spain's ground transportation is ranked in the top 15 economies, but it had started to show signs of initial decline, suggesting that upgrades and modernizations were expected. In addition, the business environment (75th) commented to be improved, as dealing with construction permits remains burdensome (104th), and there was still room to increase international openness further (43rd, down two places).

Consequently, the empirical data analysis result depicts that in the factor analysis of *core resources*, on average, **206(57.2%)** international tourists have rated that cultural world heritage sites of Ethiopia has been competitively attracting the international tourist arrivals to Ethiopia, and, **36(90%)**respondents from major stakeholders also agreed too. Despite its significant disparity that it satisfies individual difference among visitors from different source markets. However, the study's result shows that business travelers tended to visit cultural activities in the city than country because of their purpose of visit and the time that limits their length of stay.

In contrast, Tourists from Europe and Australia have rated that Ethiopia has been slightly performing in core resources over travel and tourism destination competitiveness than Africa and United States of American tourists' who have rated either. This shows, it is under performing despite its full of tourism potentials: underutilized core resources. In the *Tourism service infrastructure factor analysis*, the tourists from all regions of the globe and respondents from major stakeholders as well have rated the construct as the least performing factor of Travel and tourism destination competitiveness similarly as *tourism enabling service infrastructure and Amenities do.* The case of *Tourist demand conditions –to getting visited Ethiopia, the factor analysis shows,* it was found that, the highly performing in travel and tourism destination competitiveness for both international tourists and respondents from major stakeholders was the endowed resource of the country despite the fact that international tourists had evaluated the construct (factor) against each indicator differently the respondents from major stakeholders counter parts did.

On average, international tourists have rated neutral on their evaluation, about the *country's Travel and Tourism operational environment* except for ICT readiness. Likewise, they have rated slightly similar for the *destination management latent variables, except for Air transport (EAL's) services; and yet* tourists from all regions of the globe have observed the least judgment over travel and tourism competitiveness performance effectiveness of Ethiopia's effort for the constructs, but most of them (the inbound tourists) commented on the construct (i.e., the key indicator was), or which has been underutilized was: country branding and promotion

All in, travel and tourism destination competitiveness ranks and scores of Ethiopia which has been determined by the Key indicators, or through which the tourism performance and impacts on (e.g., *international tourist arrivals* and *international tourism inbound receipts*) the travel and tourism industry of the country has been determined, is the Ethiopian Airlines .Indeed, this made possible the country's travel and tourism destination competitiveness by its remarkable effort (e.g., its key roles in playing tourism market segments diversification, on boarding inflow of tourists and in promoting Ethiopia's endowed resources in its global destinations). In fact, within the constructs (the five factor analyses complementary pillars), a tourist from **Sudan** has witnessed about EAL's contribution was that, "by which significantly visible travel and tourism industry development of the country has been observed", and he said,

> *It is the main gate of the globe to show that Ethiopia is a very rich in historical, natural and culturally potential for its world heritage sites in tourism, for international tourists through Ethiopian airlines*

4.5 Informants Reflection on the Challenges and Gaps to which Ethiopian Airlines encountered while it is playing its key Roles in TDC Positioning

This section presents the qualitative data analysis result from both respondents (e.g., International tourists and Major stakeholders) ; and their reactions to the survey question content analysis -- what are the gaps / challenges there do you think, in relation to Ethiopian Airline's role in attracting international tourists to Ethiopia, compared to tourist destinations of Africa or beyond?

One of the participants in the study from MoCT responded as, "The Ethiopian Airlines has been and is being promoting and attracting tourists to Ethiopia for so long. However, the challenges are mainly related to the Accommodation capacity problems, especially in local tourist destination sites. In addition, formerly, the distribution of domestic air network was not as it has to be." Similarly, a respondent from Tourism Ethiopia said that, "The problem is not about the Ethiopian airlines, the destination by itself has no enough tourism service infrastructures to increasingly attract international tourists, and even it has no air station to make direct flights to many tourist destinations. Before promoting and making tourism markets, destination development should be the first requirement." However, an international tourist from United States of America replied differently that, "I do not think there are many gaps apart from advertising: it needs more promotional videos on AV services." contrast to this, a tourist from Spain has reflected on the challenge was, "Slow processing at Bole international *Airport;*

> *Ethiopia needs to market itself better to the world; its destinations are not so well known as other tourist attractions. Such as, South Africa and Kenyans do."*

Subsequently, **Zewdu H. Mariam**, a key informant from Ethiopian Airlines, provided crucially important information while the researcher was conducting Key informant interview, and he pointed out major challenges which Ethiopian Airlines has been facing are classified into Economic, political and social despite the fact that EAL is globally recognized and the fastest growing airlines on the continent. Among the major challenges from which Zewdu has focused on were *global business strategy, fuel prices, Aviation industries international competition* (i.e., EAL computes its service with *Emirates, Lufthansa, KLM Airlines,* or *British Airway of world class Airlines*), leadership, passengers aircraft cost, human resource skills, maintenance costs, bilateral or multilateral agreements, restrictive regulatory frameworks, and political stability and peace.

In addition, he recalled the economic recession which was happened in 2008-2012 as exemplary lesson learnt from it. "During that period, Ethiopian Airlines was safe, even the famous American Airlines were affected on that economic crises, indeed, Ethiopian Airlines is fortunate because its leaders (group CEO's) are always supported by governments and the business strategy which they used to design fits globally competitive advantages." Likewise, Zewdu witnessed for EAL's strength is that, although EAL faces major challenges, but the opportunities are huge. First, its ownership of modern fleets and being operated by young professionals; Second, the Airlines international and domestic network expansion and its carrier business strategy has been well established; Thirdly, for its reputation and brand awareness in all over the world; and one of the best leading Airline in customer service excellence.

Furthermore, **Ato Anmut ,** a *Key informant from Ethiopian Civil Aviation Authority, pointed out some challenges, strength, and opportunities which he* stated were,

> *Ethiopian Airlines as an airline operator, it is significantly developed, but as a general aviation, it is not developed yet. Because there are only few chartered domestic airlines (i.e., Abyssinia and National Airways) are operating the domestic routes in Ethiopia. But, generally speaking, the backbone for Ethiopian Airlines strength is the aviation's effort in keeping safety and security of the*

travelers, in deploying well-trained human resource skills and implementing advanced technologies because, safety in aviation industry, it can't be compromised for inbound and outbound tourists as well. In other words, tourists book their flight if and only if they are ensured about the safety and security of the Aircraft's safety record or history as well as the travel and tourism operational environment. Thus, the Aviation's role in travel and tourism industry is safety assurance and facilitation. In like manner, the role of Airlines is, tourism market segments diversifying, tourism service infrastructure developing, and promoting tourist products in its world destinations.

CHAPTER FIVE

Conclusion and Recommendations

This chapter discuses summary of core findings on the perspectives of Ethiopian Airlines key roles in tourism destination competitiveness aspects of Ethiopia as a tourist destination, based on the WTTC Index(2012- 2017) result ranks ,which has been given to Ethiopia since 2012 . In brief, it summarizes TDC determinant or enabling factors and indicators (i.e. Tourism based endowed resources and other TDC determinant factors) analysis result, and emerged findings from empirical data analysis. More importantly, based on the findings of the study, conclusions and recommendations are made.

5.1 Conclusion

The following conclusions are drawn from the study. **Fir**st, there are very close links with the air transport role and tourism where two-way relationships exist between them: to promote tourism resources, to contribute to travel and tourism industry GDP increments, and to contribute for employment opportunities in a nationwide. **Second**, linkages between tourism and air transport sector is an increasingly important to play a fundamental role in maintaining travel and tourism destination competitiveness position, and to enhance travel and tourism performance effectiveness of the country. ***Third***, to unlock the tourism potential of intersectional linkages, Ethiopia as a destination, all major stakeholders must get connected to a clear airline policy and business strategy ; hence, they ought to create synergy in *travel and tourism industry*, with their importance of interdependencies to Ethiopian Airlines business strategy because travel and tourism destination competitiveness ranks and scores of Ethiopia have significantly been determined by the Key indicators(i.e. *international tourist arrivals* and *international tourism inbound receipt*) of , exclusively, Ethiopian Airlines key roles, which determine travel and tourism industry’s performance effectiveness and impacts, thus substantially, this has to be measured. Hence, it is the EAL key role which made possible the Ethiopian travel and tourism industry to be competent by operating route network expansion within its more than ***107*** *destinations* throughout the world, in promoting Ethiopia’s endowed resources through conventional and digital Medias. It is also the Ethiopian airlines key role which is being played, for facilitating and onboarding tourist inflows to Ethiopia from the globe by its remarkable performance effectiveness and by its huge impacts on the Travel and tourism destination competitiveness activities, apart from other factors and destination determining indicators' efforts where they are preforming their own parts.

Conversely, key indicators such as tourism service infrastructure over performance effectiveness of travel and tourism, ICT readiness, human resources skills, health and hygiene of hotel rooms and restaurants, air transport infrastructure and business environment are found critically low in travel and tourism destination competitiveness performance effectiveness in Ethiopia, but relatively prioritization of travel and tourism, apart from this construct, is quite good in performance. Therefore, during resources allocation, these areas require greater attention and investment to enhancing performance of the attributes that fall declining, and can be better if they are diverted elsewhere. In addition, attentions should be given to relatively to the low performing indicators of the Tourism destinations in those constructs. More importantly, inbound tourists have also suggested that these constructs should be improved

Indeed, indicators such as Ethiopian Airlines ticket prices- competitiveness, purchasing power parity (PPP),Visa requirements, openness of bilateral air service agreements, people's hospitality; air- craft quality and service satisfaction as well are rated relatively high performing constructs in Ethiopia. To this end, the world heritage sites and Ethiopian Airlines contributions have been marked huge for international tourist- arrivals to Ethiopia. Hence, Ethiopian tourism destination competitiveness is significantly impacted and determined by those factors and indicators (i.e., because of the EAL's key role playing role in travel and tourism market making-activities , and availing the tourist products and services to be consumed by tourists in Ethiopia).So the tourism destination performance effectiveness of travel and tourism in Ethiopia has to be focused on EAL's key role because tourists have had the experience of highly expensive cities and air-transport ticket-prices which demand them high pricing to consume tourist products and services . But while the Ethiopia context is observed, the result shows that the pricing strategy of travel and tourism's industry is a great competitive advantage for tourists who want to consume products and services comparatively cheaper. For instance the prices of accommodation, transportation, food and beverages are markedly low in cost carriers. Similarly, it is also a comparative advantage for suppliers to expand their margin of profit by increasing the price on their products by providing quality services. Taking into account and considering tourist service satisfaction, therefore, these areas should be a point of opportunity, of travel and tourism industry in Ethiopia, for maintaining competitive balance at marginally marking better prices. However, price has a dissuasive influence on the choice of tourist activities, and yet if tourists are looking for service satisfaction, they could be less sensitive over price, and price sensitivity can be moderated by this interest in such a way that the negative effect of price sensitivity would be diminished; because tourists are rational over their expenditure and in the sense of utility maximizing(Moro, 2018).Hence, this can be enhanced in terms of tourism supply chain systems and institutional capacity buildings through: service philosophy; human resource skills development; destination management; service diversification; tourist activity differentiation and uniqueness; and through accommodation facilities and awareness /image/brand positioning. Despite these efforts that travel and tourism industry has been exerting in Ethiopia, but noticeably, international tourists suggested that country branding should be improved from suffering long existing famine and war, for its better travel and tourism destination competitiveness positioning.

With regards length of stay, in fact the length of stay for international tourists on average is 10-15 days, but this study finds out that majority of business travelers' length of stay has been identified as *less than five days; or in the range of 5-10* days in Ethiopia. In connection to this, As a rule of thumb, while tourists planned to spend money, over their length of stay and purpose of visit, they expect value for money or spend fair amounts of money for fair prices of tourist services in use: For instance, for hotel rooms and restaurants, lodging, food and beverages, for land transportation and for domestic flights, they expect to consume standardized tourism infrastructure services. Comfort is also every tourist need at the tourist destinations. Tourists might buy goods and services according to their demand from the availabilities at their destinations. In the process, financial transactions become the major practices and trends in each tourist spot, to be provided via user friendly automated machines, indeed this should be improved. As people move, they might not move with their physical currency these days, and then they require financial transactions to purchase properties which they want to have. Despite the people's hospitality and friendly hosting manner that the visitors enjoy the most in Ethiopia, and yet tourists require self-services where they move, so that they require user-friendly automated machines for financial transactions. But availing automated machines around tourist -areas was highly recommendable by inbound tourists; and considerably, EAL should charge low price in domestic flights or should avail LCCs chartered air crafts, for price options, for leisure travelers in Ethiopia.

Although Ethiopian Airlines faces major challenges, yet it has been enjoying priceless opportunities to promote Ethiopia as a destination and its tourism resources within its more than 107 bilaterally agreed destinations in the globe. It is also a good opportunity to selling tourist packages because of its **86** percent inbound total tourist arrivals was ensured via EAL. with its ownership of modern fleets and is being operated by young professionals; the Airline's international and domestic Airline network carrier business strategy have been another opportunity for its fast growing option ---- for its brand positioning in all over the world; and this made, it is one of the best leading Airlines in customer service excellence on the continent. Hence, its contribution could be concluded as,

> *Ethiopian Airlines is doing its best in tourism market segments diversifying---- in inbound tourist receipts, and promoting Ethiopia's tourism resources within its destinations throughout the globe: This in turn is contributing for, creating employments in the hospitality industry; enhancing national economic growth (GDP); foreign currency earning & investments; and for supporting MICE tourism*

Contrast to this, and as it is observed, although number of international tourist arrivals have been increased to Ethiopia since 2012, yet Ethiopia's Travel and Tourism destination competitiveness ranks and scores hadn't been significantly improved in the travel and tourism competitiveness index(**118.33/140**) result ranks, unlike some African counterparts did(i.e., South Africa, etc.). Therefore, Travel and tourism destination competitive Effectiveness is more of homework for MoCT to catch up and maintain its global competitive balance, rather than simply telling us its success story; despite Ethiopian Airlines immense key roles in contributing for Travel and Tourism industry's development, and its highly devoted national growth efforts in connecting tourist markets.

5.2 Recommendations

On the basis of the findings, in this study, the researcher has recommended the following:

- The facts that the research design inhabits some characters of exploratory nature, meaning there weren't prior comprehensive studies were conducted in Ethiopia until the researcher undertakes this title for the study. So there is no enough reason to prescribe anything before further confirmatory research is conducted, except Hiyab's study (Hiyab,2017) touched few concepts on the study area, to be considered in researcher's confirmatory analysis to test the existing models. And yet, it is assumed that this study should not be the beginning and the end of the research undertakings. However, the study has to come up with certain level of implications which should be forwarded, within its framed preliminary findings, for further research work and to better understanding of EAL's key roles which are being contributed in tourism destination competitiveness perspective. At the same time, the researcher was limited in providing the implications for not to lead to a fast and hard prescription, for the scientific community and the public at large. Hence, extended (with longer spanning period of time) and extensive (with broader scope of the study by applying advanced statistical package-regression mean value to measure each indicator) for the study should be considered, for comprehensive understanding and interpretation. This is, therefore, the study should be augmented with comprehensive, exhaustive, extensive and extended works of enquiry to get refined sets of identified TDC determinant factors and key indicators, for immediate application of Ethiopian airlines role in travel and tourism purposes.
- Nevertheless, important finding emerged in this study was-- EAL has been operating route network expansion in **107 destination- countries** throughout the world, in promoting Ethiopia's endowed resources through conventional and digital media aggressively, and subsequently, the numbers of international tourist arrivals to Ethiopia have been increased. However, travel and tourism destination competitiveness Index (WTTC, 2012-2017) rank of Ethiopia hasn't been significantly improved, nor Ethiopia's world heritages hadn't been well known by international tourists in the globe. Therefore, Ethiopian Airlines, specifically, ET-holidays should give special attention to its promotional tools effectiveness (**i.e., Pillar one**). In other words, let Ethiopian tourism resources be well known in the globe through EAL; or ET- Holiday should evaluate its track record that, whether the Ethiopia's world heritages are

being promoted effectively with in its global destinations or not? And it should also reevaluate its determination, to promoting them to increasingly attract many more inbound tourists - arrivals to Ethiopia, in line with vision **2035**.

- The other core finding which was emerged in the study was that, there is a loosely created synergy - the EAL's key roles haven't been considerably interlinked within its major stakeholders' strategic plan; or major stakeholder's plans were merely linked into the EAL's vision **2020.** To this effect, Ethiopia is not harnessing the existing tourism potential from its natural and cultural world heritage sites**.** Thus, since EAL has a national growth obligation, it should create a synergy with its major stakeholders because it is a **"*Flag carrier Airlin*e**." Therefore, major stakeholders strategic plans should be considerably interlinked within EAL vision **2035(**i. e., **Pillar four).**
- Findings on Tourism service infrastructure show that, tourists from all geographical regions, and respondents from major stakeholders as well have rated that this construct was poorly performing factor in the Travel and Tourism destination competitiveness similarly as some amenities do. Hence, it was negatively impacted on the performance effectiveness of TDC, or on the Tourist demand conditions which motivate tourists to travel Ethiopia. Therefore, it should be improved.
- MoCT should properly manage the numbers of international tourist arrivals to Ethiopia, of each year, for appropriate data retrieval and research validity purpose, by using tools like Tourism barometer, Tourism Satellite Accounts (TSA), etc. In connection to this, although my research scope was limited to Ethiopian Airlines key roles in tourism destination competitiveness, and yet other Air- transport's(i.e., Lufthansa, Turkish Airlines, Emirates, Gulf Air , Qatar Air ways and Air China's) role in onboarding international tourist –arrivals to Ethiopia should be taken into account in further research up takings.
- It is observed that separate sector policies on air transport and tourism result in, inbound tourism- in African in general, and in Ethiopia specifically, is fundamentally or too often even conflicting, disconnected from tourism policy which constitutes a severe constraint on the development of travel and tourism. So, major stakeholders should create a synergy within Ethiopian Airlines strategic vision **2035** for better coordination and to tap untapped tourism potentials in Ethiopia.

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Appendixes