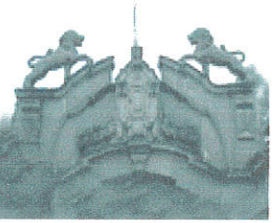
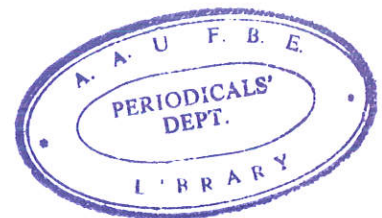


*Addis Ababa  
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***ADDIS ABABA UNIVERSITY  
SCHOOL OF GRADUATE STUDIES***

***ACHIEVEMENTS, OPPORTUNITIES AND CHALLENGES OF  
TOURISM INDUSTRY IN AMHARA NATIONAL REGIONAL  
STATE***



**BY: MELESE SITOTAW**

**ADVISOR: MEHERET AYENEW (PhD)**

***JUNE 2010***

***ADDIS ABABA***

**ADDIS ABABA UNIVERSITY**  
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**BY: MELESE SITOTAW**

**A Thesis submitted to the School of Graduate Studies, Addis Ababa  
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## List of acronyms

ANRS - Amhara National Regional State

BoCTPD - Bureau of Culture Tourism and Parks Development

BoI – Bureau of Information

EOC - Ethiopian Orthodox Church

ETO - Ethiopian Tourism Office

GDP - Gross Domestic Product

ISICTA - International Standard Industrial Classification for Tourism Activities

MoCT - Ministry of Culture and Tourism

OECD - Organization for Economic Cooperation and Development

SMNP - Semien Mountains National Park

UNESCO - United Nations Education, Social and Culture Organization

WTO - World Tourism Organization

WTTC - World Travel and Tourism Council

SARS – Severe Acute Respiratory Syndrom

HSCA- Heritage Study and Conservation Agency



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## **Abstract**

Tourism industry consists of all the firms, organizations and facilities which are intended to serve the specific needs and wants of tourists. The study was about the achievements, opportunities and challenges of tourism industry in ANRS. Assessing the coordination among the stakeholders, tourists view of service in the region, promotion and image building and protection and preservation of heritages were picked up as objectives. Primary data was collected using a structured questionnaire and interview was made with different parties. Secondary data from different sources was also used.

The increase in tourists flow in past can be attributed to the socio-economic development and democratic processes that have taken place in the country over the past decade or so. Nevertheless, the most likely reason for tourists visiting the country and the region in particular is its rich cultural and historical heritage. The demand for attractions of the region exists. There has been growing appreciation for unique culture and history, scenery and archaeological sites, flora and fauna. This trend is forecasted to continue for the coming decade. The problem is the service sector has not been responding properly. Not only there exists limitation in correctly portraying the country to the world but the service sector is not competitive enough though there have been improvements. This and others being the case, the growth in tourist flow has probably been in response to the international trend.

Achievements have been registered in formulating regulations, providing trainings to different parties, information provision etc. Challenges include the country's lingering international image coupled with poor promotion, lack of coordination among the stake holders; conservation of heritages etc. If the industry has to develop and make meaningful contribution to the regional economy, achievements have to be strengthened and challenges dealt with and hence opportunities capitalized.

# Chapter One

## Introduction

### 1.1 Background of the Study

It is clear that tourism is the major force in the economy of the world, an activity of global importance. Not only had the sector demonstrated sustained growth in the past but it has also been remarkable in its resistance to adverse economic and political conditions. Tourism is an economic activity of immense global significance. World Travel and Tourism Commission (WTTC 2002 cited in Pender 2005: 3; WTTC 2009:8) reported that the travel and tourism economy which includes itself and other indirect activities contributed 10% of the global GDP in 2002 [9.9% in 2008] and 7.8 percent [11 percent in 2008] of the global employment, amounting to 198,668,000 jobs, or one in every 12.8 jobs [238,300,000 jobs or 1 in every 11.9 jobs in 2008]. In the same year there were 702.6 million [922 million in 2008] international tourist arrivals recorded world wide and a receipt of US \$ 474 billion [US \$ 944 billion in 2008] is recorded.

Tourism provides income, jobs and foreign exchange in many countries through its multiplier effect by stimulating a range of other related sectors (Cooper et al 1998: 3; Pender 2005:2). It promotes micro and small scale enterprises and service giving businesses. World Tourism Organization (WTO<sup>1</sup> 2008:2) reported that tourism is also a key force for development and poverty alleviation since it is growing much more dynamically in developing countries than in developed ones. Tourism can also be an effective strategy for diversifying agricultural based economies particularly in drought prone areas or where agricultural income is in a decline (Ashley and Roe 1998 cited in Million 2000:6)

Tourism also bestows social and environmental significance in addition to the economic benefits. International organizations like the United Nations encourage tourism for its contribution to world peace, the benefit of the intermingling of peoples and cultures, the economic advantage that can ensue and the fact that it is relatively “clean” industry. The WTO is a specialized agency of the United Nations and the leading international organization in the field of tourism. Tourism

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<sup>1</sup> Some times written as UNWTO- United Nations World Tourism Organization

has wrongly been considered as a smokeless industry in the past. This is no longer the case. An increasingly important issue recently, however, is the negative image of tourism as a despoiler of destinations and a harbinger of adverse social change (Hall 2005: 12).

### **1.1.1 Tourism Defined**

Tourism, as most agree, is a complex, multidimensional, multifaceted activity, which touches many lives and many different economic activities (Cooper et al.1998: 8; Pender 2005: 7; Mill and Morrison 1998:5). Owing to this complexity and relative immaturity of tourism in academics, therefore, tourism has proved difficult to define. Different definitions have been provided by different authors but unanimity so far has been difficult to achieve. Let us see some definitions below.

- Tourism is the sum of the phenomenon and relationship arising out of the travel and stay of non-residents, insofar as they do not lead to permanent residence and are not connected with any earning activity (Hunziker and Krapf 1941 cited in Baud and Lawson 1977:4).
- Tourism is the temporary, short-term movement of people to a destination outside the places where they normally live and work and their activities during the stay at the destination(Tourism Society of England cited in Holloway 2002:4)
- Tourism comprises the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited (WTO 2007: 3).

Authors like Cooper et al. (1998: 8) differentiate between demand-side and supply-side definitions of tourism. According to them, tourism is defined in terms of the motivation and other characteristics of travelers in demand-side definitions. Hence, we can see that all of the above three definitions are demand side definitions. The supply-side definitions, on the other hand, attempt to define tourism from the perspective of firms, organizations and other facilities intended to serve the needs of tourists. A good example is Leiper's definition. He defined tourism as consisting of (Leiper 1979 cited in Cooper et al. 1998:9) all the firms, organizations and facilities which are intended to serve the specific needs and wants of tourists. It is also not

uncommon to differentiate between conceptual or descriptive and technical definitions. The former express the essential nature of tourism while the later attempt to define tourism with the view of isolating it from other forms of travel for statistical purpose.

The above being the case, the precise measurement of travel and tourism has not always been easy. There are a number of reasons for this difficulty. According to Pender (2005:4), this measurement problem stems in part from different definitions and methods of accounting adopted by different countries. Others like Cooper et al. (1998:3) emphasis the complexity of the tourism sector. They argue that travel and tourism economy includes itself plus a number of indirect activities that makes it difficult to measure. Indeed, tourism is a multidimensional, multifaceted activity, which touches many lives and many different economic activities. There are still others who argue that the relative immaturity of tourism as afield of study made it difficult to come up with the precise measurement of it (Sharply 2005: 4).

However, efforts to come up with a precise measurement have been made by different scholars and organizations. In this respect, Pender (2005: 4) mentioned the efforts by Organization for Economic Cooperation and Development (OECD) while Cooper et al (1998:9) emphasizes that of WTO as helpful. WTO's International Standard Industrial Classification of Tourism Activities (ISICTA) identifies activities partly involved with tourism and an activity totally dedicated to tourism is a good example. Accordingly, construction is totally dedicated to tourism if it is for hotels, recreational facilities, transport facilities, resort residence etc. whole sale and retail activities is partly dedicated to tourism when it is motor vehicle sales, retail food sales while it is totally dedicated to tourism in the case of retail sales of travel accessories, souvenir sales etc. Generally speaking, the significance of tourism as a mechanism for economic development means that it is an investment opportunity that few governments can afford to ignore world wide.

### **1.1.2 Trend of Tourism Industry**

Over the past six decades, tourism has experienced continued growth and diversification to become one of the largest and fastest growing economic sectors in the world. Over time, more and more destinations have opened up and invested in tourism development, turning modern tourism into a key driver for socio-economic progress (WTO 2008:1). Tourism has become one of the major international trade categories. WTO in the same document reported that the export

income generated by international tourism ranks fourth after fuels, chemicals and automotive products. Most authors are unanimous about this steady growth of the industry (Pender 2005: 5; Cooper et al. 1998: 2; Holloway 2002:8). The idea of Cooper et al. goes "... in the world of change, one constant in the last quarter of the twenty century has been the sustained growth of tourism both as an activity and as an industry".

According to WTO (2008:2), international tourist arrivals grew from 25 million to 903 million from 1950 to 2007. The overall export income generated by these arrivals (international tourism receipts and passengers transport) grew at a similar pace, outgrowing the world economy, exceeding US\$ 1 trillion in 2007, or almost US\$ 3 billion a day. Between 1995 and 2007 growth averaged over 4% a year, in spite of the stagnation between 2001 and 2003 due to terrorism, SARS and the economic downturn. International tourism receipts rose to US\$ 856 billion in 2007. There has been also a rise in the number of new destinations. While, in 1950, the top 15 destinations absorbed 98 percent of all international tourist arrivals, in 1970 the proportion was 75 percent and this fell to 57 percent in 2007, reflecting the emergence of new destinations, many of them in developing countries.

Outbound tourism in recent years has been increasingly driven by emerging source markets. A number of reasons for the rapid growth of demand for tourism industry have been forwarded by different writers and organizations. Socio-economic growth and progress and the resulting high income, improvement and expansion of different modes of transport, advancement of information technology, more leisure time, changing life styles, increased overseas visiting and growing number of people reaching retirement age are to mention some (Cooper et al. 1998:4; WTO 2008:2; Sharply 2005: 4-6).

The future also looks bright for tourism as forecast indicate that the better days for it are still to come. *Tourism 2020 Vision* is the WTO's long-term forecast and assessment of the development of tourism up to the first 20 years of the new millennium. An essential outcome of it is quantitative forecasts covering a 25 years period, with 1995 as base year and forecasts for 2010 and 2020. (WTO 2008: 10). UNWTO's *Tourism 2020 Vision* forecasts that international arrivals are expected to reach nearly 1.6 billion by the year 2020. Of these worldwide arrivals in 2020,

1.2 billion will be intraregional and 378 million will be long-haul travelers. The total tourist arrivals by region shows that by 2020 the top three receiving regions will be Europe (717 million tourists), East Asia and the Pacific (397 million) and Americas (282 million), followed by Africa, the Middle East and South Asia. East Asia and the Pacific, South Asia, the Middle East and Africa are forecasted to record growth at rates of over 5% per year, compared to the world average of 4.1%. The more mature regions, Europe and Americas, are anticipated to show lower than average growth rates. Europe will maintain the highest share of world arrivals, although there will be a decline from 60% in 1995 to 46% in 2020. The pace of change is driven by both factors outside of tourism itself (exogenous) such as demographic and social changes, transportation development, political developments etc and changing nature of the tourism system itself (tourism related factors).

### **1.1.3 The Trend of Tourism in Ethiopia and Amhara Region**

Despite its historical, cultural and natural attractions, it is reasonable to argue that tourism in Ethiopia is a recent phenomenon. Even though certain historical records indicate that some form of travel for military purpose, searching for fertile land and pasture etc has been taken place, tourism as an important sector of the economy was recognized only in the second half of the twenty century (Ayalew 2009 :70). It is possible to claim that official recognition for tourism has been given since the time of Emperor Menelik II with the establishment of the first hotel, now Taitu, in 1907. But formal institutional mechanism for running tourism related activities of the state was not organized until establishment of Ethiopian Tourist Office (ETO) by order number 36/1964 under the then Prime Minister Office (Ayalew 2009:77). One year later a plan for the development of tourism was prepared and publicized for the first time. This plan considered tourism as one of the key sectors of economic growth in its own right up to 1974.

Parallel to the international trend tourism industry has been showing increase until it showed decline during the Derg regime. According to Ayalew (2009: 78-80) the sector has been growing at annual average rate of 12 percent up to 1974. The tourism development policy document of the Ministry of Culture and Tourism (MoCT: 2009:3) articulates that tourism industry declined drastically during the seventeen years of Derg regime. Combined effects of a number of factors like internal instability; recurrent drought and famine; the socialist ideology; difficulty in free



movement with in the country etc were responsible. It has then shown revival since EPRDF come to power in response to social, political and economic changes that were taking place. Accordingly, international inbound tourist arrivals increased from 81,581 in 1991 to 383, 399 in 2008 except the down turn trend during the Ethio-Eritrean war. The same document enunciates that the average annual tourist arrival was 324,664 while the average annual revenue was 167 million dollars from 2005 to 2008.

Tourism industry in Amhara region has not been an exception to the trend disused above. Recently, increasing number of inbound tourists has been drawn to the region by its rich historical and natural attractions. The data from the Bureau of Culture, Tourism and Parks Development (BoCTPD 2009) depicts that inbound tourists flow in the region almost doubled from 36,200 in 2003/04 to 71,779 in 2008/09. The region is home for three of the eight Ethiopian world heritages sites registered by UNESCO for their outstanding universal value for humanity- the Rock Hewn Churches, Fasillades Castle, the Semien Mountains National Park (SMNP). A document from BoCTPD (2007: 3-4) states that the region is rich in historical and natural attractions. Monasteries and mosques, archeological sites, water falls, impressive scenery, flora and fauna, literary and archival heritages are to mention some.

To sum, what determines the degree of success and acceptability of tourism is response of the tourism sector to these level of growth. An important part of the management of the sector is the understanding of the drivers and determining the appropriate response (Cooper et al., 1998:449). Obviously, tourism is one of the main income sources and the number one export category, creating much needed employment and opportunities for development for many developing countries. The responsible regional government body leading the development of the sector at forefront is the BoCTPD at regional and its counter bodies at zone and woreda levels of administration.

## **1.2 Statement of the Problem**

As discussed in the above section, tourism industry has been growing rapidly and it is also estimated to continue to grow in the future. More over, the trend is expected to be in favor developing countries. It is forward, that a well thought out response by actors is required if the

above opportunity have to be reaped. To put precisely, the industry has to respond to the increased growth opportunity with improved transport network, new hotels and resorts as well as local services that support the needs of tourists.

Ethiopia's travel and tourism market has enormous potential. It not only offers the usual African game and cultural experiences to visitors, but also a rich array of historical and ecological sites that set it apart from most of its neighbors. However, despite its huge potential, the travel and tourism market has yet to develop to a point where it can make a significant contribution to Ethiopia's economic development. While tourist numbers are rising, growth in arrivals and tourism expenditure are by no means commensurate with the potential of the country's attractions (Euro monitor International 2009:2; MoCT 2009:4). Not only Ethiopia's share of the international tourism is very small but also it is among the lowest in sub Saharan Africa. In 1999 Ethiopia's share was only 0.4% compared to other African countries (Million 2000:4). This figure was 0.58 % in 2003 (Dawit 2009:2). A further disappointing figure is Ethiopia's regional share of the tourism business. It was only 0.7% all the tourists visited the 17 East African countries (MoCT 2009:6)

As far as the region's tourism is concerned, it has been witnessing growth in line with the national trend. The data from the BoCTPD (2009) depicts that inbound tourists has increased from 36,200 in 2003/04 to 71,779 in 2008/09. It has almost doubled within this period. Nevertheless, the data tells a different story when compared with the national inbound tourist flow statistics. The region's share of the total flow of inbound tourists in the country has decreased from 20 percent in 2003 to 17 percent in 2008. In between the trend has been irregular. It first increased, declined for two years and then started to slightly rise up. Specifically, it was approximately 20, 21, 19, 15, 16 and 17<sup>2</sup> percent of the national flow from 2003 to 2008 respectively.

Several factors might be responsible for this. The major constraint to the development of tourism is the continuing negative perception of Ethiopia in the global community. Limited promotion and inadequate tourism infrastructure also present major challenges to development. The limitation in service provision both in quality and quantity; collaboration among stakeholders

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<sup>2</sup> The detail computation is available in appendix B

and under development of domestic tourism are other constraints. The sector potential, therefore, remained untapped both in the country in general and the region in particular (Euro monitor International 2009:3; MoCT 2009:13-22).

Before people go to a destination they develop the image and a set of expectations based on previous experience, word of mouth, press reports, advertising and common beliefs (Mill and Morrison 1998: 124). The country's lingering international image mainly associated with persistent drought and famine is the main challenge of the tourism industry. Needless to mention that the geographical location of the country- Horn of Africa which is famous for its instability and high threat of terrorism- contributes a lot to how the country is being perceived around the world and hence requires a huge job image building. On top of this, there is limitation in promotion and marketing as clearly stated in the policy (MoCT 2009:18).

Another major obstacle of the sector is service. Tourism is a service industry. Tourists and travelers need and expect service, whether related to trip planning, reservations handling, efficiency in transportation, or the service available at their destination (Pender 2005:9; Cooper et al. 1998:4). The condition of the service sector, thus, is a major determinant of the development of the sector. The limitation in the service sector is affirmed in the country's tourism development policy. Not only limitations in service exist both quantity and quality but the sector is also marked by shortage of man power (MoCT 2009:17). In addition, People like Beek (1997 as cited in Million 2000: 5) wrote that the quality of facilities is low and infrastructure like water, electricity or communication is often inadequate. He further argues that hygiene is a serious problem, and there is lack of awareness about the level of service that tourists expect.

Still another problem is under development of domestic tourism. The idea that tourism is mostly international is a myth. It is actually domestic (Cooper et al 1998: 2). Domestic tourism in the country in general and in the region in particular is not developed and limited to family visits and religious celebrations (Million 2000:4; MoCT:19). Million justified his claim by pointing out the fact that the whole focus has been on international tourism and domestic tourism is sidelined as result. In multi-ethnic and multi-cultural nation like ours the development of domestic tourism

should not only be justified from economic point of view but also from socio-political point of view.

Finally, conservation of attractions is central as they are the basis the industry. Developing tourism entails developing existing and new tourist attractions. Most importantly, it entails conserving the heritages and ensuring they are available for the future generation. According to Dawit(2009:1), tourism, if not managed properly, represent an economic sector that has a tendency to erode or damage the very resource it relies up on. There are shortcomings with respect to conservation and protection as well as presentation of attractions (MoCT 2009:15). Conservation involves the safeguarding of a cultural resource, retaining its heritage values and extending its physical life. It includes all work undertaken to remedy and mitigate deterioration in the condition of cultural resources, excluding passive measures covered by protection. In this context, conservation includes not only preservation but more interventionist work, such as restoration or adaptation (UNESCO 1972:1)

Studies in area of tourism are generally lacking at a country level in general and at the regional level in particular. Especially, researches carried out at regional level are highly lacking though there are few studies at town or zonal level. Thus, this study has been conducted to explore the achievements, opportunities and challenges in Amhara National Regional State.

### **1.3 Objective of the Study**

The overall objective of the research is to assess the achievements, opportunities and challenges of tourism industry in Amhara National Regional State (ANRS). The tourism picture of Ethiopia is used as a template to evaluate the activities of the study area.

The following are the specific objective the research

- To review the level of coordination existing between stakeholders of the industry (government bodies, investors, civil society, religious institutions, general public etc)
- To assess the tourists' perception of the different service provided to them in the region

- To evaluate issues relating to image and promotion of tourist attraction
- To appraise activities in the protection and preservation of the tourist resources

With the view of achieving the above stated objectives, the research attempted to answer the following research questions

- What is the extent of coordination among the stakeholders in the industry in the region?
- What is tourists' perception of the condition of service in the region? How satisfied are they with the place they visit and service they have been provided?
- To what extent the regions attractions are promoted and how is the country in general and the region in particular being perceived by tourists?
- What is the level of protection and preservation of tourism resources in the region?

## **1.4 Research Methodology**

Case study was employed for this research. Case study is commonly used in the qualitative research which entails collection and presentation of detailed information about a given phenomenon. In other words, it involves examination of all variables of problem in order to provide complete understanding on the given event or situation. Indeed, the nature of the research problem is more qualitative since it involves probing information of attitudes, perception etc of tourists and other parties.

### **1.4.1 Data collection and sampling method**

The study was carried out based both primary and secondary data. Primary data were derived through sample survey using structured instrument (questionnaire) and interview with different bodies (both instruments are available in appendix A). The questionnaire was designed in such a way that can elicit the required information for achieving the objectives. Sixty and forty

questionnaires were distributed to inbound tourists in different hotels and Pensions in Bahir Dar and Gondar towns respectively. Only 60 filled out questionnaires, 38 in Bahir Dar and 22 in Gondar, were collected back.

Moreover, interviews were made with Heads of BoCTPD, North Gondar Culture and Tourism division, Bahir Dar City Culture, Tourism, Labor and Social Affairs Office and officials of West Gojjam and North Gondar dioceses of the Ethiopian Orthodox Church (ECO). Interview schedules were prepared; appropriate time with each one of them arranged and the interviews were carried out. Secondary data from reports, policy documents and other documents from MoCT, BoCTPD and other sources were used.

As highlighted above, it was not easy to select respondents for the research. Initially, it was planned to distribute questionnaires to tourists by going directly to places where they might be available. It was in deed attempted in Bahir Dar town but turned unsuccessful because tourists were often not willing to cooperate. The researcher then decided to distribute the instrument through receptionist of hotel and pension in Bahir Dar and Gondar towns where tourists usually stay. The receptionists were made free to make decisions on who should be included in the sample. In short, purposive sampling was used to select respondents. Purposive sampling over random sampling was used as total number of tourists visiting the region with in the collection period can not be known to use random sampling. Purposive sampling was selected over cluster sampling because most tourists will visit different tourist sites and make it difficult to have area classification. The researcher believed that stratified sampling for this research is not applicable for the reason that variable for stratification might be limited and prior information for the same may not be readily available.

#### **1.4.2 Data analysis**

The data so collected was analyzed using different techniques. Predominantly, the data analysis technique used was qualitative owing to the nature of data collected. The qualitative data was described and analyzed under each objective. Tables and graphs were used to present quantitative data and such analysis techniques as averages; percentages, ratio etc were used. Data relating to tourist arrivals and receipts was analyzed using trend analysis.

## **1.5 Significance of the Study**

One of the relevance of this research is its policy relevance. It is straight forward that effective policy making heavily depends on the availability of relevant information. The research is expected generate information about the status of tourism sector –achievements, opportunities and challenges- that can be used by regional decision makers and others as an input in their decision making. This is particularly true as the region is expected to formulate its own tourism development policy using the already formulated national policy.

Given the significance of the tourism sector to an economy and the potential of the region, the contribution of findings of this research can be very crucial. Tourism and its development can be an effective strategy for diversifying agricultural based economies like ours. Through promoting domestic development, it can also promote better understanding between people. The findings of this study will contribute in this regard. At a micro-level, the findings of this research can also indicate areas of improvement for managers of hotels and other tourist service providers. It can also be considered one contribution to the scientific community in the area of tourism. Hence, others interested in the same area can use it as a reference in the future.

## **1.6 Scope of the Study**

The study was carried out in Amhara National Regional State. It was about achievements, opportunities and challenges of tourism industry in the region. To bring the issue under the sphere of public administration, emphasis was made on government organizations as elements of the industry. Specifically speaking, attempt was made to assess the role of the region's BoCTPD in the development of the sector. Data for the same was collected in Bahir dar and Gondar towns. In addition, the coverage of the study was limited to economic impact of tourism not other impacts like environmental, socio-cultural etc.

## **1.7 Organization of the study**

This particular study is about the achievements, opportunities and challenges of tourism industry in Amhara National Regional State. It is organized in the following manner. The first chapter deals with the proposal part of the research. It consists of background of the study, statement of the problem, objectives, research methodology etc. The second chapter is dedicated to review of related literature. It provides information as to what tourism and tourism industry are, explains the components of the industry, describes the impacts of tourism and finally summarizes all these under the conceptual frame work for the research.

The primary and secondary data collected for the research are presented and analyzed in chapter three. This chapter is arranged objective wise, i.e., the information gathered for the research is presented and analyzed under each objective of the research as appropriate. As it is often done the final chapter is about the findings of the research. Hence, chapter four of this paper presents not only the conclusions arrived by the researcher but also the recommendations forwarded. There are also about five appendices in this paper having providing different information for the readers.



## Chapter Two

### Review of Related Literature

Tourism industry has become among the major socio-economic sectors and leading component of the international trade in the world. Tourism is an activity of global significance. It has got economic, socio-cultural and environmental impacts. Most governments encourage the tourism sector for its ability to generate employment, foreign exchange, revenue for the government and local community and for its diversifying effect in the economy. It is also encouraged for its catalyzing effect on the development of other sectors.

#### 2.1 Definitions of Tourism

One thing is evident as far as a definition for tourism considered, the difficulty in defining it. Tourism is a multidimensional, multifaceted activity which touches many lives and many different activities. Not surprisingly, therefore, it proved difficult to define. According to Cooper et al. (1998: 8), the difficulty in defining tourism is not only a reflection of complexity but it is also indicative of the relative immaturity of tourism as a field of study. Therefore, it is difficult to find an underpinning coherence approaches in defining tourism, aside from the need to characterize the “otherness” of tourism from similar activities such as migration. Further difficulties exist in defining precise forms of tourism. Holloway (1994:2) described that it is problematic to establish clear lines between shoppers and tourists. In general, there are definitional problems in relation to tourism and these in turn have led to measurement difficulties. Yet, it is vital to attempt to define tourism.

Definitions of tourism can be thought of as either demand- side definitions or supply- side definitions. Cooper et al. (1998: 8) are among those to distinguish between demand-side and supply-side definitions of tourism. The former define tourism in terms of the motivation and other characteristics of travelers while supply-side definitions try to define tourism from firms, organizations and other facilities intended to serve the needs of tourists. It is also common to differentiate between conceptual or descriptive and technical definitions with in the above two major category of definitions. Holloway (2002:3) and Pender (2005: 6) make it clear that the definitional debates surrounding the concept of tourism are likely to rage on. According to them,

while it is relatively easy to agree on technical definitions of particular categories of tourism and tourist for statistical purpose, the wider concept is ill-defined. Holloway even went far to the extent of concluding that defining tourism precisely in conceptual terms is an all but impossible task.

### **2.1.1 Demand-Side Definitions**

- Tourism is an activity. It is an activity that takes place when, in international terms, people cross borders for leisure or business and stay at least 24 hours but less than one year (Mill and Morrison 1998:2).
- Tourism is the activities of a person outside his or her usual environment for less than a specified period of time and whose main purpose of travel is other than exercise of an activity remunerated from the place visited (Chadwick 1994: 66 cited in Pender 2005: 4).
- It is now commonly accepted that a tourist as opposed to a day visitor, is some one who spends at least 24 hours away from home even though both categories of visitor might engage in similar activities. Although there is no generally accepted maximum time-limit for a tourist visit, it is normally accepted that a tourist a tourist is away from home for a relatively short period (France 1994:3 cited in Pender 2005: 5)
- Tourism refers to the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes (WTO and UNSTAT 1994 cited in Cooper et al. 1998:8).
- Tourism comprises the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited (WTO 2007: 3).

The above conceptual or descriptive definitions of tourism convey the essential nature of tourism (Cooper et al. 1998:8; Mill and Morrison 1998: 3). Accordingly, tourism has the following features

- It arises out of movement of people to, and their stay in, various places or destinations.
- There are two elements in tourism- the journey to a destination and the stay [including activities] at the destination.
- The journey and the stay takes place outside the usual environment or normal place of residence and work so that tourism gives rise to activities that are distinct from the residents and working population of the places through which the travel and stay.
- The movement to a destination is temporary and short term character – the intention is to return within few days, weeks and months
- Destinations are visited for the purpose other than taking up permanent residence or the exercise of an activity remunerated from (employment) the place visited.

Technical demand-side definitions attempt to define tourism with the view of isolating it from other forms of travel for statistical purpose. The technical definitions demand that an activity has to pass certain “tests” before it counts tourism. According to Cooper et al. (2005: 9), such tests include the following

- Minimum length of stay- one night. Visitors who do not stay overnight are termed as same day visitors or excursionists.
- Maximum length of stay- one year
- Strict purpose of visit categories- [leisure, business, conferences, education etc]
- A distance consideration is sometimes included on the ground of delineating the term ‘usual environment’- the WTO recommendation is 160 kilometers.

Accordingly, people traveling for the purpose of recreation, family visit, conference, pilgrimage, study and research, short training and medical treatment etc are considered as tourists while military personnel, migrants, nomads, diplomats, refugees, people in transit do not pass the above tests and therefore are not considered as tourism activities. This is despite the fact that there is no complete consensus among authors about which particular groups of travelers are considered tourists and which are not.

## 2.1.2 Supply Side Definitions

As with demand side definitions there are two basic approaches to defining tourism- conceptual and technical. From a conceptual point of view, Leiper (1979:400 cited in Cooper et al. 1998:9 and Pender 2005: 6) suggests ‘the tourism industry consists of all the firms, organizations and facilities which are intended to serve the specific needs and wants of tourists’. The major problem concerning technical supply side definitions is the fact that there is a spectrum of tourism businesses, from those who are wholly serving the tourists to those who also serve local residents and other markets (Cooper et al. 1998:9; Mill and Morrison 1998:4; Pender 2005:6). One approach to the problem, according to Smith (1989 cited in Cooper et al. 1998:9) is to classify them into two

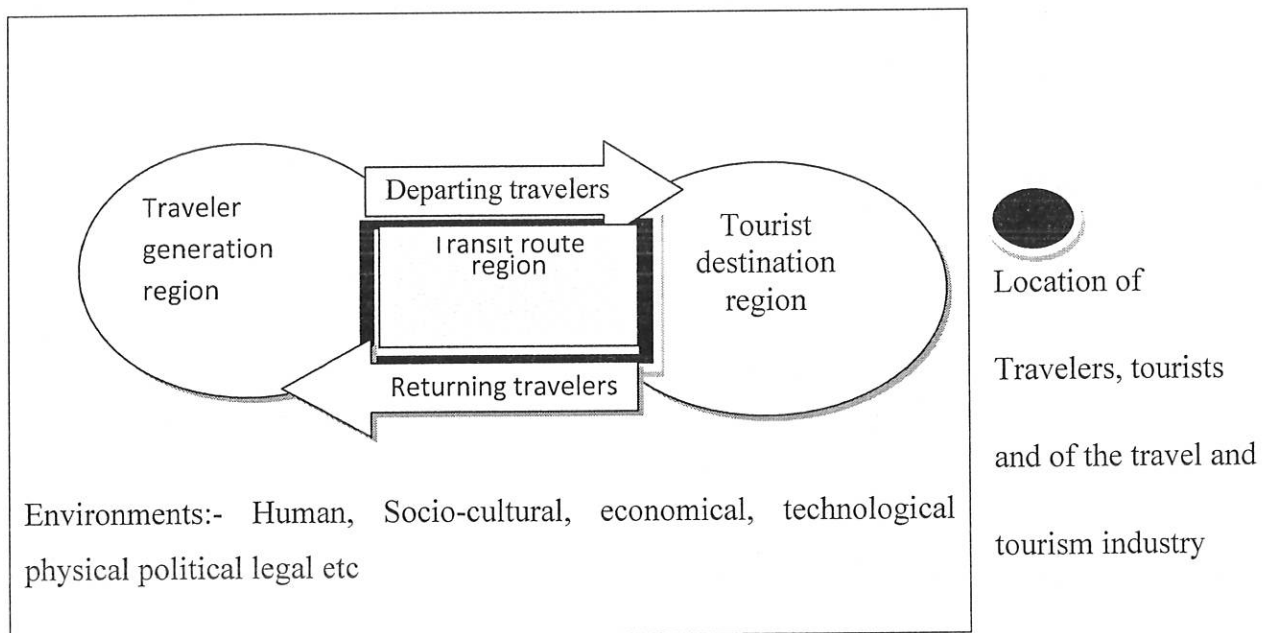
- *Tier 1*: Business that would not be able to survive with out tourism which includes such businesses as airlines, hotels, national parks etc. This businesses earn almost all of their revenue from tourists (0-100 percent of their revenue)
- *Tier 2*: businesses that could survive without tourism, but in a diminished form that include restaurants, taxis, local attractions etc. The percentage of revenue from tourists for these businesses is estimated to be 10-90 percent

This approach is consistent with other industrial sectors, and allows the size of the tourism industry to be gauged using Standard Industrial Classifications (SICs) - an important development as there is no SIC for tourism (Smith 1989 cited in Cooper et al 1998:9). WTO has taken this further by developing a Standard Industrial Classification of Tourism Activities (SICTA). The SICTA adopts the idea of part involvement with tourism and total dedication to tourism. For example, construction is an activity totally dedicated to tourism if it is of hotels, recreational facilities, resort residence etc while financial intermediation like exchange of currencies, life insurance, credit cards have part involvement with tourism.

## 2.2 The Tourism System

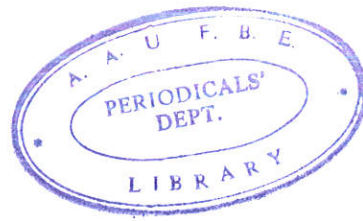
As discussed above tourism spans a variety of fields. It is multi disciplinary and complex. This has clear implications for the provision of organizing frameworks for the study of tourism. There are many ways to do this. Many different frameworks have been developed in relation to a particular orientation as well as some which offer a more holistic view. However, Leiper's basic tourism system is preferred by many writers not only for its enduring popularity but also for ease of understanding it (Pender 2005:7; Cooper et al., 1998:5; Mill and Morrison 1998:4). Leiper first offered this model for consideration in 1979, although it has since been updated. His model neatly takes in to account many of the issues identified in the above section by considering the activity of tourists, allowing industry sectors to be located and providing the geographical element which is inherent to all travel. The researcher, therefore, adopts Leiper's model as adopted by the above writers.

**Figure 1.1: The tourism system**



Source: Leiper 1990 as adapted by Cooper et al 1998:5 and Pender 2005:7

The three basic elements of Leiper's model are the tourists, geographical element and the tourism industry. These elements are discussed below:-



### **2.2.1 Tourists**

The tourists are the actors in the system. Tourism, after all, is a very human experience, enjoyed, anticipated and remunerated by many as some of the most important times of their life. In practice tourists are heterogeneous groups with different personalities, demographics and experiences. Thus, tourists can be classified in a number of ways. According to Cooper et al. (1998: 11) can be classified in two basic ways:-

#### **a) Domestic versus international tourism**

The most common distinction is between domestic and international tourists. This is basically a geographic classification, i.e., who travels to where classification of tourists. Domestic tourism, therefore, refers to travel by residents within their country of residence. It is the activity of resident visitors within the economic territory of the country of reference. Domestic tourists are travelers whose country is the country visited itself. There are rarely currency, language or visa implications, and no crossing of national borders. This and other features make domestic tourism more difficult to measure than international tourism.

International tourism is a travel by residents outside of their country of residence. It is a travel to overseas country. International tourists are travelers whose country of residence is different from that of the country visited. It, therefore, involves crossing of borders and has currency and language implications. International tourism is also further classified into inbound- travel by residents from overseas into a country (the activity of non-resident visitors within the economic territory of the country of reference); and outbound- travel from the generating country to another country (the activity of non residents outside of the economic territory of the country of reference).

Other forms of tourism include internal and national tourism. Internal tourism is the activity of both residents and non resident visitors within the economic territory of the country of reference whereas national tourism is the activity of resident visitors inside and outside of the economic territory of the country of reference.

## **b) Classification on the basis of purpose of visit category**

Tourists can also be classified by 'purpose of visit category'. Conventionally, three categories are used:- (a) leisure and recreation- including holiday, sports and culture tourism and visiting friends and relatives; (b) business and professional- including meetings, conference, missions, incentive and business tourism and (c) other tourism purposes- including study and health tourism.

## **2.2.2 Geographical Elements**

Leiper outlines the three geographical elements in his model- traveler generating regions, tourist destination regions and transit route regions

(a) Traveler-generating regions - represent the generating market for tourism and, in a sense, provide the 'push' to stimulate and motivate travel. It is from here that the tourist searches for information, makes the booking and departs.

(b) Tourist destination regions - represent the 'sharp end' of tourism. At the destination, the full impact of tourism is felt and planning and management strategies are implemented. The destination too is *raison d'être* for tourism, with a range of special places distinguished from the everyday by their cultural, historic or natural significance (Rojek and Urry 1997 cited in Cooper et al. 1998:5). The 'pull' to visit destinations energizes the whole tourism system and creates demand for travel in the generating regions. It is therefore at the destination where the most noticeable and dramatic consequence of the system occur (Leiper 1990: 23 cited in Cooper et al. 1998:5; Pender 2005:8).

(c) Tourist route regions - this does not simply represent the short period of travel to reach the destination, but also includes the intermediate places which may be visited en route: 'There is always an interval in a trip when a traveler feels they have left their home region but have not yet arrived ... [where] they choose to visit'. In the words of Leiper (1990:22 cited in Cooper et al. 1998 5), these are the places termed as transit route regions.

### **2.2.3 The Tourism Industry**

The tourism industry can be thought of a range of businesses and organizations involved in the delivery of the tourism product. Leiper (1979:400 cited in Cooper et al. 1998:9 and Pender 2005: 6) suggests 'the tourism industry consists of all the firms, organizations and facilities which are intended to serve the specific needs and wants of tourists'. Similarly, Henderson (1994: 9) and Mill and Morrison (1998:7) described that the travel and tourism industry exists as a broad network of commercial and non commercial organizations linked together by the common objective of servicing the needs of travelers and tourists.

The above description of the industry is consistent with many others authors (Lickorish and Jenkins 1997: 9; Pender 2005: 8). Despite such consensus in general terms, however, less agreement surrounds exactly which firms, organizations and facilities are included in tourism. More over, there is no agreement that tourism can be described as an industry. Mill and Morrison (1998: 8) doubt the very consideration of tourism as an industry. They argued that it is hard to describe tourism as an industry given the fact that there is a great deal of complementary as well as competition between tourism businesses. For the purpose of this study, tourism is considered as an industry.

Tourism is a complex phenomenon. It is a multi-sectoral, multifaceted business and this in itself creates difficulties when attempting to generalize about the management of tourism businesses. It is multi-sectoral because it encompasses different industrial sectors, According to Lickorish and Jenkins (1997: 12), tourism is an activity which cuts across conventional sectors in the economy, requiring input of an economic, social, cultural and environmental nature. This accounts for tourism's multifaceted nature. The same authors highlight the lack of a common structure that is representative of the industry in every country. In particular, they argue that the amorphous nature of the tourism industry makes it difficult to evaluate its impact on the economy relative to other sectors of the economy.

Clearly, tourism activities cover a variety of sectors, including government organizations, intermediaries (travel trade), transportation, attractions and accommodation (Cooper et al. 1998: 220; Mill and Morrison 1998:11). The view of Henderson (1994:12-13) is extreme. He points out that some of these sectors with in the industry can be seen as independent industries. The



accommodation and airline sectors are also referred to as industries in their own right, for example. It is necessary therefore to recognize the extent and nature of involvement in travel and tourism, yet this is not always easy. One way to view tourism is as a collective activity that may or may not be described as an industry, consisting of various sub-sectors which may be industries in their own right.

However, despite the unique nature of the tourism industry and the differing attributes of the individual sector there are common characteristics trends and issues that are evident across the board. High level of customer contact, demanding staff to be highly trained in both operational and customer care; the prevalence of seasonal and irrational demand pattern, involving enterprises in the use of promotional and pricing strategies; the importance of location vis-à-vis access to market etc are to mention some. Also it is important to understand the complex linkage and interrelationship that exist between the various individual sectors of the tourism industry and the mutual dependence of one sector to the next (Cooper et al. 1998: 222; Henderson 1994: 14)

## **2.3 Actors in Tourism Industry**

### **2.3.1 Government organizations**

Government intervention in tourism industry through its institutions is crucial. Most authors are unanimous about the importance of public sector involvement. According to Hall (2005: 218) there is an almost universal consensus by governments around the world, regardless of ideology, that tourism is a good thing, with most tourism policies being designed to expand the industry. The same author further argues that although tourism is often regarded as a private sector activity, government agencies at every level have to adopt a progressively more active role in the use of tourism as a development tool. The current practice worldwide is government agencies promoting tourism as a panacea for underemployment in economically depressed areas.

Having a similar stand, Cooper et al. (1998: 223) enumerated some of the reasons of public involvement. Their argument is that while tourism must involve participation and funding by the private sector, there are many clear and powerful reasons why the public sector must remain involved. These reasons include the following:-

- Many core tourists attractions- such as landscape, culture and built heritage and architecture – are public goods, to this end, public sector involvement is at worst desirable and at best crucial.
- Many activities such as planning, research, resource allocation, management and regulations can be undertaken most effectively- and most importantly- by the public sector.
- The lack of expertise in the tourism industry in certain key areas (such as marketing) and the domination of small business with inadequate funds to promote themselves sufficiently provide a compelling argument for continued involvement of the public sector.

Other authors like Mill and Morrison (1998:74) put forward most pronounced rationales for government participation in tourism. These include foreign exchange earning and their importance for balance of payment; employment creation and the need to provide education and training; maximizing the net benefit of the host community; protect the tourism resources and environment; building the image of the country as a tourist destination; monitor the level of tourism activity through statistical survey etc. Governments are, therefore, involved with tourist organizations at both international and national level. Governments shape the economic climate for the industry, help provide the infrastructure and educational requirement for tourism, establish the regulatory environment in which business operate and take an active role in promotion and marketing (Hall 2005:219).

In light of public sector involvement with tourism, either directly through ministry or other organization with responsibility for tourism, or indirectly through foreign policy, legal controls or the provision of infrastructure, the government has as its disposal a series of instruments which can be used to manage tourists flow to meet its policy objective. Cooper et al. (1998: 235) classified these instruments in two ways- demand and revenue management and supply and cost management. The former instrument is aimed at guiding tourists' choice, controlling the cost of stay or stimulating or regulating visitor numbers and includes such instruments as marketing and promotion, information, pricing and controlling access whereas the later is concerned with influencing the providers of tourists facilities and services. Land use planning and control,

building regulation, market regulation, market research and planning, taxation, ownership and investment incentives are supply and cost management tools.

Cooper et al. (1998:230) are of the view that there are considerable variations in the structure of public administration of tourism, which in turn depends on the size of the industry and the importance the government attaches to the various reasons advanced for public sector involvement in tourism. This being the case, there are a number of ways that governments can participate in tourism. Hall (2005: 222) identified seven functions of government in relation tourism: co-ordination, planning, legislation and regulation, entrepreneur, stimulation, a social tourism role and a broader role of interest protection. Each of these functions affects various aspects of tourism including development, marketing, policy, promotion, planning and regulation.

Public planning for tourism occurs in a number of forms (development, infrastructure, land and resource use, promotion and marketing), institutions (different government organizations) and scales (national, regional and local). Government has legislative and regulative powers to direct the industry. The level and area of government regulation of tourism tends to be a major component of the industry. Governments can also play a substantial entrepreneurial function in tourism through owning and operating tourist ventures including hotels, travel companies and transportation networks. Financial incentives such as low interest loans or depreciation allowance; sponsoring public research on tourism and marketing and promotion aimed at generating tourism demand are some of the tools government may employ to execute its stimulation role (Hall 2005: 225-227)

Of the roles of government, probably is that of coordination. This is because the successful implementation of all other roles will, to a larger extent, dependent on the ability of the government to coordinate and balance the various roles in the tourism development process (Hall 2005: 223). Coordination, in simple terms, refers to relationship among existing networks of organizations, interests and/or individuals. It usually refers to the problem of relating units or decisions so that they fit in with one another, are not at cross purpose and operate in ways that are reasonably consistent and coherent. The need for coordinating tourism has become one of the great truisms of the industry.

Tourism is a complex, multidimensional, multifaceted activity, which touches many lives and many different economic activities. According to Edgell(19990:7 cited in Hall 2005:223), there is no other industry in the economy that is linked to so many diverse and different kinds of products and services as is tourism industry. This diffused nature of tourism with in the economy and with in the government system calls for collaboration among actors. For making the best net benefit (maximizing the benefits and minimizing the costs) out it co-ordination for tourism is at worst desirable and at best crucial. The kind of cooperation needed for tourism can be considered at two levels. On one hand, partnership between respective tourism bodies and non governmental actors in the sector is crucial. On the other hand, co-ordination with in the government system, both horizontally and vertically, is required. On the whole, meaningful collaboration of actors- both with in the government system and government and non government players- is desirable for the development of the sector.

### **2.3.2 Intermediaries**

In all industries the task of intermediaries is to transform goods and services from a form that consumers do not want, to a product that they do want. For everyday house hold requirement, this is performed mainly through holding bulk supplies and breaking these into amounts required by individuals, as well as bringing the goods to the market place. In tourism the situation is somewhat different, for it is quite possible to buy the components of the tourism trip [accommodations, transport, excursions and entertainment] directly from producers. This dispenses with the need for middlemen. The fact that this does not happen in many cases is because the linkages between the suppliers of tourism products and their potential customers are imperfect (Cooper et al. 1998: 248; Henderson 1994: 89).

Given the above situation, it is possible for intermediaries to improve distribution channels and so to make markets by bringing buyers and sellers together. The bulk of this work falls upon the tour operators or wholesaler who packages the main component of the tourist trip in to a single product and sells this at one price through retail travel agents. By and large, the role of the retail travel agents has been to provide an outlet for the actual sales of tours, tickets and travel services, such as insurance or foreign exchange, for the public (Henderson 1994: 90). The principal role of the intermediaries in travel and tourism is, therefore, to bring buyers and sellers together, either

to create markets where they previously did not exist or to make existing markets work more efficiently and thereby expand market size. This often comes about through tour operators or wholesalers assembling the components of the tourist trip into a package and retailing the latter through travel agents, who directly deal with the public.

By making markets, travel intermediaries bestow benefits on producers, consumers and the destination (Cooper et al. 1998: 248). First, producers are able to sell in bulk and so transfer risk to the tour operators, though wholesalers do attempt to cover themselves by including release clauses in agreements. Second, suppliers can reduce promotion costs by focusing on the travel trade, rather than consumer promotion which is much more expensive. Thirdly, travelers avoid search and transaction costs both in time and money by being able to purchase an inclusive tour. Fourthly, consumers gain from a specialist knowledge of the tour operators and the fact that the uncertainties of travel are minimized. Finally, destinations, especially in developing countries where budgets are limited, may benefit considerably from the international marketing network of tour operators. However, it would be naïve to expect, as some countries do, that this is the responsibility of these companies.

As far as the structure of the distribution channels, i.e., linkage between the suppliers of tourism product and their potential customers, is concerned, there are direct and indirect sales of individual components of the tourism product. Independent travelers, according to Cooper et al. (1998: 249), put their own itinerary together. This they can do by purchasing the key components of accommodation and transport, directly from suppliers, or from their own outlets, or via the retail travel agent. This is common in domestic tourism because they have good knowledge and ready made access to telephone to make reservations. A package or inclusive tour is when travelers purchase most of the components of the trip (transport, accommodation, entertainment etc) directly from tour operators (wholesalers). This actually is an indirect linkage between the producer and customers. Intermediaries, wholesalers and retail travel agent, are involved.

### **2.3.3 Transportation**

Tourism is about being elsewhere and, in consequence, the relationship between transport development and tourism has traditionally been regarded as 'chicken and egg' (Page 1994: 37). Adequate transportation infrastructure development and access to generating markets is one of

the most important requirements for the development of any destination. On the other hand, tourism demand has stimulated the rapid development of transportation. As millions of tourists expect to be transported safely, quickly and comfortably to the destinations at a reasonable cost, the transportation industry has had to adjust in order to accommodate to this increased and sophisticated demand.

If tourist product is understood, in its widest sense, as everything that the visitor consumes not only at the destination but also en route to and from the destination, then transport provides some key element of the product (Page 1994:39; Cooper et al 1998: 274). Indeed, transportation for tourism is an essential element of the tourist product in two ways: it is the means to reach the destination and it is necessary as a means of movement at the destination. Page(1994: 45) argued that visitor expenditure figures can be used to illustrate the importance of transport as an element of the product- transport at a destination can represent as much as 15 percent of the international visitor expenditure with in a large country such as Indonesia.

The most obvious way of analyzing transport is by mode to denote the manner in which transport takes place. There are four major modes of travelling (Cooper et al 1998:275, Page 1994: 40) – road, rail, water and air. Some of these modes may be further distinguished by transport to the destination as opposed to transport at the destination. To a substantial extent, the choice of mode of transport by the visitor is related to purpose of travel. In general, the visitor's choice of mode of transport is affected by such considerations as distance and time factors; status and comfort; safety and utility; geographical position and isolation etc. Obviously, the relative importance of these major influences upon modal choice will vary from one visitor type to another.

Another important consideration is the elements of transportation. Cooper et al (1998: 275) and Page (1994: 115) have identified four basic elements of transportation, namely: the way, the terminal, the carrying unit and motive power. The way is the medium of travel used by a transport mode. It may be purely artificial such as roads and railways; or natural, such as air or water. Roads, railways and inland waterways restrict vehicles to movement to a specific pattern, while air and sea allow flexibility due to international regulations. The terminal, the second important element, gives access to the way for the users, or act as an interchange between different types of ways. The carrying unit is the actual transportation media: the vehicle that

facilitates the movement. Finally, and perhaps the most important, motive power is closely related to a number of issues such as the capacity and type of the carrying unit, demand and desired speed and range of the vehicle.

#### **2.3.4 Accommodation**

Accommodation or lodging is, by a long way, the largest and the most ubiquitous subsector within the tourism economy (Baud and Lawson 1977: 120; Cooper et al 1998: 314). With few exceptions, tourists require a location where they can rest and revive their travel through, or stay within, a tourism destination. Accommodation varies from one that provides for one or two guests in a simple, home style to 'bedroom factories' with a capacity to cater for up to five thousand guests. It can also be a very basic, functional form, or in an extreme luxury and opulence. Ownership can be private and informal, or it may be provided within units operated by major multinational organizations. In short, accommodation is characterized by extreme heterogeneity and any attempt to generalize about the sector must take this into account.

The types of accommodations vary in their importance and contribution to both domestic and international tourism. In the words of Baud and Lawson (1977:121), there are close links between accommodation providers and other sectors within tourism where the cross-sectoral characteristics of tourism organizations are increasing with integration in the tourism industry. For example, hotels have always been major providers of not only food service but also leisure, sporting, entertainment facilities and business and conference services. Likewise accommodation's relationship with transportation is one of long standing but it is one that is increasing in its sophistication and complexity, as transport providers recognize that accommodation can be an attraction to guests in its own right and not just a necessary service to be provided en route.

In the context of the tourism sector in general, accommodation rarely has a place or rationale in its own right. It is rare for a tourist to select to stay in a hotel or other forms of accommodation for its own sake. Rather, the choice is made because the accommodation provides a support service for the wider motivation which has brought the visitor to a destination, whether for business or leisure purpose. It is arguable that some resort hotels may fall outside of this generalization.

Accommodation is a necessary component in the development of tourism with in any destination that seeks to serve visitors other than day trippers. The quality and range of accommodation available will both reflect and influence the range of visitors to a location. As such, achieving the appropriate balance of accommodation to meet the destination’s strategic tourism development objective can be a challenge. It is difficult to generalize about the proportion of the total tourist expenditure that it is allocated to accommodation because this varies greatly according to the market, accommodation and nature of the product purchased. As a very general rule, perhaps 33 percent of the total trip expenditure is allocated to this sector (Cooper et al 1998: 318)

As explained above, this sector is characterized by extreme heterogeneity. This being the case it will be difficult to explain the sector in a full-fledged manner. A precise summary of categories of accommodations, however, is given in the following table.

**Table 2.1: Categories of accommodations and their descriptions**

Accommodations	Descriptions
Hotels	Undoubtedly, the most significant and visible subsector with in the accommodation. Provide not only accommodation, food and beverage services but also entertainment, sporting etc
Guest houses, Boarding houses, Bed and Breakfast and pensions	Smaller units offering inclusive accommodation and meals for residents, for longer, and regular periods
Motels	Specially sited and planned to provide convenient accommodation for motorists along major roads
Hotel garnish, Apart hotels	Provide bed and breakfast or accommodation with out meals
Hostel accommodations	Provide for specific group of users (youth, associations, pilgrims) and facilities are invariably shared. The accommodation may include dining, social and recreational



	service
Camping sites, Caravan sites	Visitors bring their own accommodation to the destination in the form of tents, caravan or trailers
Campus accommodations	Most campus accommodations of universities and colleges seek to utilize their resources when students are at vacation
Self catering accommodation- apartment, cottages etc	A combination of accommodation with additional recreational areas and the facility to prepare food on a personal basis
Time –share	A form of period- constrained (i.e. one or two weeks a year) self-catering, holiday home ownership which provide additional benefits to the owner in the form of access to other similar properties in resorts around the world
Cruise liners, Ferries, Trains, Aircrafts	Provide basic accommodation when one travels long distance

*Source:* Cooper et al. 1998: 315-322; Baud and Lawson 1977: 120-124

### 2.3.5 Attractions

Tourist attractions, in simple terms, are the primary causes for travelling away from their homeland. Attractions are integral to the tourism product, often, providing the primary motivation for tourists visit. It is widely known that attractions provide the single most important reason for leisure tourism to a destination. Many of the components of the tourist trip- from example transport and accommodation- are demands derived from the consumer's desire to enjoy what a destination has to offer in terms things to see and do. Thus a tourist attraction is a focus for recreational and, in part, educational activity undertaken by both day and stay visitors.

There are many different types of attraction, and a number of attempts have been made to classify them. According to Cooper et al. (1998: 290), classification is possible along a number of different dimensions like ownership, capacity, market or catchment area, permanency and

type. Early attempts to classify were according to type, distinguished between natural and artificial attractions. This actually is the most common type of classification. The former that are gifts of nature include landscape, water bodies, climate, vegetable, forests and wildlife. The later are principally the products of history and culture, but also include artificially created entertainment complexes such as theme parks. Man made attractions include culture (religion, museums, architecture, art galleries, archeological sites), traditions (folklore, festivals) and events (sports and cultural events) (Cooper et al. 1998:291; Gunn 1979: 89).

However, Gunn (1979: 90) described the division between natural resources and artificial attractions is not always clear cut. According to him, many natural attractions require considerable input of infrastructure and management in order to use them for tourism purpose. This is the case of water parks, ski resorts, safari parks and many attractions based on nature. This infrastructure may be put to protect the resources from environmental damage. Similarly, artificial attractions that are the legacy of history and culture also share with natural resources the fact that they cannot be reproduced with out considerable expense and alteration of their authenticity, unlike attraction designated principally for entertainment.

## **2.4 Promotion and Image of a Destination**

Tourism industry is one of the most complicated industries in terms of marketing. A tourist destination refers to a variety of services and products, each of which being developed independently but making one image that tourists perceive and contributing to the tourist's level of satisfaction by the whole trip. Managing and control of all the tourism suppliers need a good understanding of the whole market. An important role occupies marketing research, focused on understanding of the tourist consumer behavior. Knowing the characteristics, needs and preferences of the target market, as well as travel motivators and determinants in the destination choice is a key success factor for the destination marketing planning. Before people go to a destination they develop the image and a set of expectations based on previous experience, word of mouth, press reports, advertising and common beliefs. Final destination choice of visitors is often dependent on the destination image that potential tourists have. There are important issues in this regard- destination images formation, strategies to alter these images etc (Lickorish and Jenkins 1997: 89).

Destination image has been defined as an individual's overall perception or total set of impressions of a place and as the mental portrayal of a destination (Lickorish and Jenkins 1997: 89). Country's image, according to Cooper et al (1998: 171) is people's impressions of country that they do not live at. Millman and Pizam (1995 cited in Mill and Morrison 1998: 132) define destination image as the sum of tourism experience-related attributes, while Buhalis (1995 cited in Lickorish and Jenkins 1997: 89). ) defined it as a set of expectations and perceptions a prospective travelers has of a destination. In general, the image of destination is the individual perceptions of the characteristics of destinations that can be influenced by promotional information from the destination, news media as well as many other factors.

According to Lickorish and Jenkins (1997: 91), destination image is composed of various attributes that can be divided in controllable attributes and uncontrollable ones. The former includes such variables as destination product, price, place and promotion while the later relates to personal characteristics. Mill and Morrison (1998:134) wrote about the factors determining a destinations image. According to them, a destination image is influenced by the environmental attributes—atmospheric attributes (landscapes, historical attractions, infrastructure, accommodation and facilities) and service attributes. Tourism managers can use these attributes to manipulate potential tourists' destination image formation. But it is also important to understand the images potential tourists have already had about the destination. This can help in developing of positional strategies to alter these images.

Destination image is formed by gathering information about a destination from various sources over time. Many researches (Lickorish and Jenkins 1997: 91; Mill and Morrison 1998:134) assume that there is a difference between destination image that have past tourists to a destination and those who have not visited the destination yet. If the past tourists form the destination image from their personal experience, potential tourists use information that provide travel agencies, advertisements, internet, television, mass media and word of mouth, as well as history of the country, learned from books and educational centers. Such images, so called incomplete images, can differ from the images that past tourists to a destination have. Images based on past experienced are considered more complex and differentiated. It is necessary to identify important destination attributes that contribute to image perception from past visitors.

Destination image can be determined by a variety of factors. Thus, Milman and Pizam (1995 cited in Mill and Morrison 1998: 135) suggest that familiarity with a destination could influence the perception and image that tourists have of a destination. Other researchers like Cooper et al (1998:174) consider that experience at the destination can influence and modify the initial image of destination. Thus, there is a correlation between the destination image and customers satisfaction after experiencing tourism products and services. Moreover, image destination has direct impact on travel behavior and plays a crucial role in the destination selection process, because tourists usually choose the destination with the most favorable image. That's why it is very important to understand image formation and destination selection process (Mill and Morrison 1998: 132).

According to (Cooper et al 1998:175), destination image can even contribute to forming destination brand. Thus, a strong brand position of a destination is dependent on the positive destination image. Traditional approach to destination positioning is based on image formation by promoting the most attractive attributes of a destination. More recent approaches suggest considering tourist's attitudes towards the tourism products, their expectations about it, their needs, and preferences. They conclude that destination-positioning strategy should be based on the customers' image of the tourism product, the satisfaction of the product attributes, and the tourist needs and preferences in a tourist destination. And only after that, unique attributes of a destination should be identified in order to find a competitive advantage that will differentiate it from other competitors.

Positioning a destination's image in the minds of target group of customers is a core activity of marketing organizations. Off course, it is a long process that implies multiple steps: identifying the images that are of value to a target group, correlating specific images with diverse demographic variables within the target group, positioning the benefits of the destination to support an existing image or create a new one, and communicating those benefits through images to the target group. These communicated images should be valid, believable, simple, have appeal, and distinctive in order to be effective.

Promotion can play an important role in meeting educational and financial goals and objectives. If a destination can accommodate greater numbers, and has a mechanism for retaining tourism

earnings, it can be promoted to draw an additional visitors and generate increased revenue for sustaining operations, solving management problems and meeting goals and objectives. Many simple and low-cost promotional actions are possible; out of which selection can be made. Promotion of a destination involves effectively communicating to potential travelers what a destination has to offer, keeping in mind the ultimate objective of motivating them to visit the destination in question (Cooper et al 1998:177; Mill and Morrison 1998: 133).

There are different mechanisms can be employed in the campaign either on print or electronic media. Buhalis (1995 cited in Lickorish and Jenkins 1997: 94) enumerated such techniques as preparation of printed materials like brochures, posters, maps, postcards and travel manuals and their effective distribution; preparing audio-visual materials (film, documentary, slide etc) for use in seminars and others presentation to tourists; advertising using, newspaper, magazine, radio, television and internet and participating in trade fairs and show related to tourism. According to him past evidences show that effective participation in the international tourism and travel exhibitions give good results. In addition, national tourism offices or embassies can be a free and effective means of distributing promotional materials and supplying information to travel magazines, newspapers, radio and the internet is another cost effective way to promote a destination. (Cooper et al 1998: 178)

For effective marketing and promotion of a destination, Mill and Morrison (1998: 134) provide the following tips. On the basis of marketing research:-

- Decision on which type of visitors to target in a promotional campaign have to be made.
- Dividing visitors into groups according to their characteristics, referred to as market segmentation, permits managers to set up well-directed promotional links between different consumers and organizations. To be selected for management action, a market segment must have three characteristics: it must be measurable, it should be easy to reach through promotional distribution systems, and it should promise increased earnings sufficient to more than repay the costs of targeting it with promotional materials.
- Identifying people with similar motivations and needs enables the manager to pinpoint the types of promotional materials needed.
- A SWOT can be used to identify gaps between promotion strategy and tourism trends

- Developing a theme by combining a destination's most attractive elements to develop slogans or sound bites, will facilitate the design and creation of brochures and interpretation displays.

## **2.5 Impacts of Tourism**

Tourism is the biggest and the fastest growing industry in the world. This fast growing industry has significant impacts on both tourist generating and tourist destination areas. Most researches indicate tourism's impact on the destination areas. Assessing the impact of tourism on the destinations will be significantly important for the development of tourism industry and for managing tourism resource that are essential for the industry. Commonly, the impacts of tourism are categorized in to economic, socio-cultural and environmental impacts (Burns and Holden: 1995: 94; Cooper et al: 127).

### **2.5.1 Economic Impact**

As stated by many authors, the economic impact of tourism for tourist-receiving areas can be hugely significant (Holloway: 1992:117; Burns and Holden 1995: 94; Cooper et al.1998: 127). Indeed, some destinations depend on tourism for their income. Such income is generated from a number of sources, including wages and salaries of those in tourism related employments. Hence, one of the primary motivations of developing countries for promoting themselves as a tourism destination is to gain more economic development. Most author divide the economic impact of tourism in to positive and negative (Burns and Holden 1995: 95; Cooper et al 1998:130). It has both desirable and certain undesirable consequences. In fact, the positive impacts by far out weight the negative ones. That is why governments actively promote and develop it.

Cooper et al (1998: 130- 138) and Burns and Holden (1995: 95-102) enumerate a number of positive economic impacts of tourism on communities, regions and nations. It is a virtuous circle of desirable impacts that it creates. First and for most, tourism brings significant foreign exchange to a destination through tourists' expenditures on hotels, restaurants, recreational activities, tour and others services. The host community has to open those service providing

businesses for tourists. Tourism, thus, increases business opportunities of the local communities and other entrepreneurs outside the region. Generation of employment is another benefit of tourism. It plays a significant role in generating jobs directly through employment in hotels, restaurants, night-clubs, taxes, souvenir sales, and indirectly through supply of goods and services needed by tourism related services. The resulting outcome being increase in income and improvement in standard of living of the local communities.

Moreover, tourism also serves as source revenue for government both directly and indirectly. Direct contributions are those generated through levying taxes on incomes from tourism and tourism business or on the tourist themselves such as departure taxes while taxes and duties levied on goods and services supplied to tourists generate indirect income for the government. Government, on the other hand, has a responsibility of providing infrastructure and other facilities necessary for tourism development. The income generated from the tourism sector can, thus, be used for the construction of airport, roads, ports, and other utilities on which the local community and other economic sectors are beneficiary.

Whatever discussed above is only one side of the story. There is the other face of tourism. Though tourism is encouraged for its blessings as discussed above, it has also certain undesirable consequences. The above authors discussed a range the undesirable consequences of tourism parallel to the desired out come. The unfavorable economic effects on the host communities include increasing the price of goods and services; increasing the cost of infrastructure development. Tourism also increases the price of land, maintenance cost for infrastructure and non local owners of tourism industry may export profits gained from tourism into other regions. It also encourages the economic dependency of the local communities on tourism sector which is seasonal in most cases. The problem in this case, i.e. when local communities are highly dependent on tourism sector, is under employment and unemployment during off-seasons.

A well-recognized phenomena in tourism is the Tourism Income Multiplier (TIM), where by tourists' expenditure in an area is re-spent by recipients, so augmenting the total. The factor by which tourists' expenditure is increased in this process is the multiplier (Holloway 1994: 119). Burns and Holden (1995: 101) argued that tourism has larger multiplier effect compared to other economic sectors. Every unit of tourists' expenditure goes through several rounds of income

creation and expenditure before its effect is exhausted. For example money spent by tourists on hotel accommodations, food and beverages goes to super markets as hotels buy supplies. Super market owners in turn use that money to pay for farmers who grow vegetable and this circulation goes on and on. Therefore, money gained from tourists circulates in to numerous segments on the economy through the multiplier process. Tourism can greatly influence a balance of payments account of the country visited and a debit against the home country account as any money spent overseas is an import to the generating country and an export to the receiving country (Holloway 1994: 119). Below is the summary of economic impacts of tourism

**Table 2.2: Economic impacts of tourism**

Positive impacts	Negative impacts
<ul style="list-style-type: none"> <li>• Source of income for both government and local communities by providing different services for tourists</li> <li>• Employment opportunities</li> <li>• Increasing business opportunities</li> <li>• Increasing and improving the infrastructure development of a regions</li> <li>• For the distribution of wealth among different regions and local communities (Multiplier effect)</li> <li>• Utilization of natural resources like land for the sources of income</li> </ul>	<ul style="list-style-type: none"> <li>• Increasing the price of goods and services</li> <li>• Increasing the maintenance and the construction costs of infrastructure</li> <li>• Profit may be exported by non-local owners into other regions</li> <li>• High dependency of locals on tourism sector</li> <li>• Seasonal nature of employment</li> <li>• Increase the price of land</li> </ul>



## 2.5.2 Environmental Impacts

The environment and tourism are intimately related and affect each other. On one hand, the environment in itself creates the major tourist attraction potential for an area and tourism affects the natural environment in various forms on the other (Burns and Holden 1995: 107). Here again, there are desirable and undesirable impact of tourism (Cooper et al 1998: 160; Burns and Holden 1995: 107). Recently, the negative impacts to tourism are emphasized and the talk of the day is sustainable tourism- tourism development that meets the needs of the present tourists and host regions while protecting and enhancing opportunity for the future.

The period when tourism has wrongly been considered as “smokeless” industry has already. It has major negative consequences environment including generating wastes and pollutions; lost agricultural/forest land and natural environments for construction of tourism sector. Also the construction of infrastructures and services may be the cause of change of landscape and drainage pattern; decreasing the size of green spaces; loss of fauna and loss of flora. Uncontrolled visiting or overuse can degrade historic sites and monuments. A constant stream of visitors may disturb wildlife by altering the natural behaviors. The promotion of tourism to bring more tourists without considering the existing infrastructure and services may decrease the quality of urban environment and bring high traffic congestion.

On the contrary, tourism contributes to protect our natural environment. The awareness of the local community about the natural environment as source of income can be the cause for protection and preservation of valuable natural resource (ocean, lakes, forests and others) from further ecological decline. Land that can be developed may generate income by accommodating the recreational activities of visitors. Income generated from tourism may be used to preserve and restore historical buildings and monuments. It is also a reason for improvements in the area’s appearances through cleaning, repairs and through increasing additional public art such as water fountains and monuments. Also it can be used to increase the quality of water and swimming pools; which have impacts to attract more visitors. Below are the environmental impacts

**Table 2.3: Environmental impacts of tourism**

Positive impacts	Negative impacts
<ul style="list-style-type: none"> <li>• Protection of natural environments and preservation from further environmental degradation</li> <li>• Preservation of historical sites and monuments.</li> <li>• Improvement in the quality of the natural environmental.</li> </ul>	<ul style="list-style-type: none"> <li>• Pollution of air and water; noise; solid waste; visual disturbance</li> <li>• Lose of agricultural and forest land</li> <li>• Loss or change of natural landscape and drainage pattern</li> <li>• Degradation historical sites and monuments</li> <li>• Disturbance of the wildlife</li> <li>• Decreases the quality of urban environment.</li> <li>• Loss of Fauna and Flora</li> </ul>

### 2.5.3 Socio-Cultural Impacts

Socio-cultural impact of tourism refers to the manner in which tourism affects the individuals and at collective level the whole local communities (Cooper et al 1998: 186). Such impacts are based on the characteristics of contacts between the hosts and the tourists. Kadt (1979 cited in Burns and Holden 1995: 114), identified three ways of contact between tourists and the host communities - when tourists buy goods and services; when hosts and tourists share facilities and when tourists and hosts meet for cultural exchange.

Cooper et al (1998 198-204) and Burns and Holden (1995: 115-119) have come up with positive and negative impacts socio-cultural of tourism on the local communities'. To begin with the positive impacts, tourism can improve the standard of living of the local communities by increasing the number of attractions, recreational opportunities and services. It provides an opportunity for the local community to meet interesting people and make friendship, learn about the world and expose themselves to new perspectives and cultural exchange. Also tourism often promotes higher levels of psychological satisfaction from opportunities created by tourism

development and through interactions with travelers. Last but not least, tourism encourages the development and upgrading of various facilities and services, like police, fire protection and medical service.

Tourism can be the cause for certain socio-cultural problems of the community. It is the major factor that attracts more people from surrounding regions and cause rapid increase in the population number and in changing the age and sex structures of the tourist destination region. Tourism offers new forms of employment opportunities, which may withdraw workers from other economic sectors. Further promotion of tourism may attract more tourists resulting in shortage on certain service, facilities and resources. Illegal activities and social problem like crime, prostitution, and gambling tends to be increase in the relaxed atmosphere of tourist areas. The contact between hosts and tourist may change the consumption pattern of the society and the potential of meeting and marrying non-local mates may create family stress. New amenities and recreational facilities may be developed to satisfy the interest of tourists without considering the interest of the local community. Tourism may increase the spread of health problems such as HIV AIDS, cholera, and so on. The development of tourism may result in the displacement of residents from their original settlement.

**Table 2.4: Socio-cultural impacts of tourism**

Positive impacts	Negative impacts
<ul style="list-style-type: none"> <li>• Improve the standard of living of the local communities.</li> <li>• Creating an opportunity for access of the local communities to various recreational facilities &amp; services.</li> <li>• Improves the level of understanding of the local communist about external world.</li> <li>• Promoters cultural exchange of the local community</li> <li>• An opportunity of meeting interesting people.</li> </ul>	<ul style="list-style-type: none"> <li>• Increases population number changing age and sex structure of the destinations</li> <li>• Withdraw of employment from other sectors into tourism</li> <li>• Shortage on certain services, facilities and resources</li> <li>• Affects the day to day life of the community</li> <li>• Increasing the social problems</li> <li>• Change in the consumption pattern of the society</li> <li>• Spreading of health problems</li> <li>• Displacement of residents due to tourism development</li> </ul>

## 2.6 Conceptual Framework

Conceptual framework is a theoretical foundation of the research and governs it. The framework presented below is basically a summarized and systematic presentation of what is discussed in the whole of the chapter. It can be presented in different ways- diagrammatically, in a table etc. but the researcher prefers tabular presentation merely because he finds it easy and appropriate and allows him to include an explanation of issues included in it

**Table 2.5: Conceptual framework**

Concept	Definition	Operationalization
Resource for the development of tourism	An input for the development of tourism sector in a specific region. It is called <i>supply component</i> of tourism system	<ul style="list-style-type: none"> <li>• Natural and cultural tourist attractions in the region</li> <li>• Infrastructure, services ,human resource and facilities</li> <li>• Travel and supporting services</li> <li>• Regulation and policy environment</li> <li>• Coordination among actors</li> <li>• Protection and preservation of heritages</li> </ul>
Tourism Market	The existing potential to visit and use the destination resources. It is called <i>demand components</i> of the tourism system	<ul style="list-style-type: none"> <li>• International and domestic tourists that visit the region: numbers, origins and purposes</li> <li>• How local residents use the tourism resource</li> </ul>
Promotion	Marketing communication that is used to influence target customers away from the place at which the products are delivered and sold	<ul style="list-style-type: none"> <li>• Preparation of printed materials like brochures, posters, maps, postcards and travel manuals and their effective distribution</li> <li>• Preparing audio-visual materials (film, documentary, slide etc) for use in seminars and others presentation to tourists</li> <li>• Advertising using, newspaper, magazine, radio, television and internet, trade fairs</li> </ul>
Impact of tourism	Envisioned or actual consequence of tourism sector	<ul style="list-style-type: none"> <li>• The economic, environmental and socio-cultural consequences of tourism</li> </ul>

Source: adapted by the researcher from Cooper et al 1998.

## Chapter Three

### Data Presentation and Analysis

#### 3.1 Background of the study area

The study is carried out in ANRS. ANRS is one of the nine regions in the country and location wise found between 9 to 14 degree latitude to the north and 36 to 40 degrees of longitude to the east. The data from Bureau of Information (BoI 2007/08: 1) indicates that the region covers 15 percent of the total area of the country and shares boarder with Tigray region to the north, Afar region to the east, Oromia region to the south and Benishangulgumuz and Sudan to the west.

The region consists of different terrain from the highest pick in the country- Ras Dashen Mountain- to the lowlands to the west bordering Sudan. Accordingly, the climate the region is varied. Almost all types of climatic conditions from “Wurchi” to “Kola” exist in the region. There are also different rivers like “Abay”, “Tekeze”, “Angereb” etc and lakes such as “Tana”, “Ardebo” that can be used for different uses(BoI 2007/08: 2).

The system of government in the region is parliamentary. The regional parliament has 294 seats which will be held proportionally by the different nations and nationalities of the region. The nations and nationalities in the region include “Amhara”, “Awi”, “Wagemhira”, “Oromo” and “Argoba”. The region is organized in to 10 administrative zones (three of them are nationality zones), 128 woredas and 3429 kebeles. The population is estimated to be 19.6 million (BoI 2007/08: 2)

As far as the regional economy is concerned, it is predominately agricultural. According to the BoI (2007/08:2), the regional GDP was Birr 19.45 billion in 2006/07 while per capita income was about Birr 1000. In the same document it is estimated that about 89 percent of the regional population live in rural areas and basically engaged in agriculture. Like other place in the country, the agriculture in the region is essentially traditional and productivity is very low.

Tourism is an important economic activity with immense blessings. It provides income, jobs and foreign exchange in many countries through its multiplier effect by stimulating a range of other related sectors (Cooper et al 1998:3; Pender 2005: 2). The fact that it is growing much more dynamically in developing countries than in developed ones will make it a key force for development and poverty alleviation (WTO 2008: 2). Tourism can also be an effective strategy for diversifying agricultural based economies like ours, particularly in drought prone areas or where agricultural income is in a decline (Ashley and Roe 1998 cited in Million 2000:6). Tourism, however, is not free of odds. There is, in fact, the other face of tourism, i.e., it has undesirable outcomes. There are adverse consequences of economic, social and environmental nature parallel to the desired ones. Unless it is properly managed, it damages, among other things, the very resource it is based up on (Dawit 2009:1). All these call for active involvement and management of government bodies at fore front leading the sector to a desired direction.

### **3.2 Tourism indicators**

The governments pursue different strategies to develop the tourism sector. The ultimate objective is straight forward, maximizing the benefit out of the sector. It generates revenue and jobs, serves as a source of foreign exchange and many more. The performance of the industry can be assessed from different perspective. Tourist flow and revenue generated are the most commonly used indicators (WTO 2008:1). Tourist flow data may relate to inbound tourists, outbound tourists, domestic tourism, national tourism (outbound plus domestic), internal tourism (domestic plus inbound) etc. For our purpose, however, we only consider inbound and domestic tourism. Tourism growth in terms of both flow and revenue has been a global phenomenon. Africa's share of the global tourism market has been also increasing. Our country was not different. There has been rise both in inflow of tourists and receipts from them. Accordingly, there has been rise in both of the indicators in Amhara region. The following table provides regional statistics the above indicators.

**Table 3.6: Tourists Flow and Revenue Data for ANRS**

Year	Inbound tourists flow	Domestic tourists flow	Revenue (in Birr)
1996 (2003/04)	36,200	94,011	32,154,000
1997 (2004/05)	44,502	119,004	40,184,000
1998 (2005/06)	45,428	51,089	42,174,189
1999 (2006/07)	53,149	67,808	52,591,721
2000 (2007/08)	60,932	100,268	60,135,578
2001 (2008/09)	71,779	126,261	121,340,775*

Source: ANRS - BoCTPD

\* Includes revenue from Mekiet, Awramba and other secondary attractions of the region

\*The formula for estimating the revenue was adjusted to result such a sharp increase.

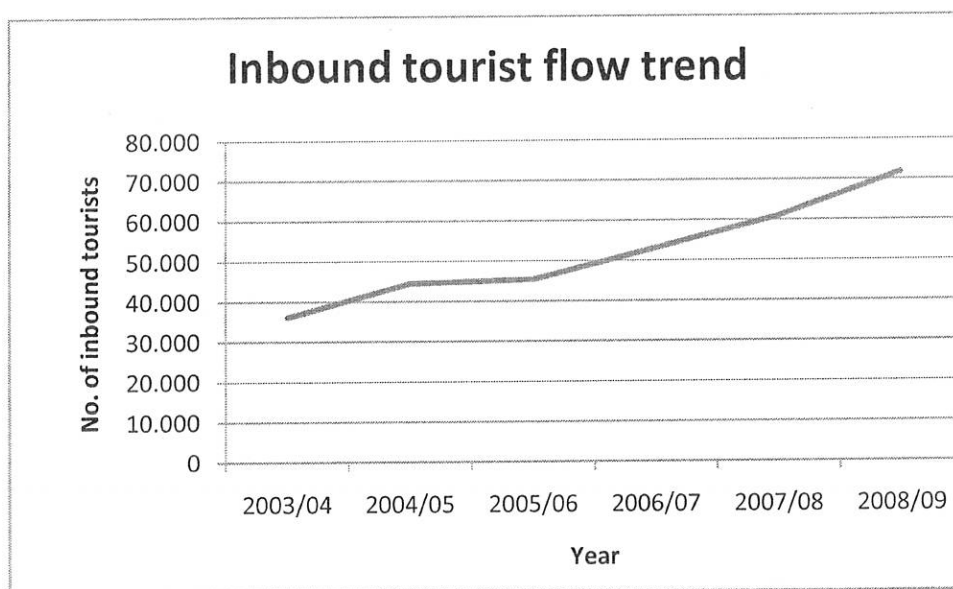
In the last six years, inbound tourist arrival has been steadily increasing in the region. This is a desirable outcome, as the benefit accrued is expected to increase with the rise in the flow of tourists. Let us explore this indicator further using the regional data in the following table.

**Table 3.7: Inbound tourist flow in the region**

Year	Yearly inbound tourists inflow	Yearly increase (in number)	Yearly percentage increase
1996 (2003/04)	36,200	-	-
1997 (2004/05)	44,502	8,302	22.9%
1998 (2005/06)	45,428	926	2.1%
1999 (2006/07)	53,149	7,721	17.0%
2000 (2007/08)	60,932	7,783	14.6%
2001 (2008/09)	71,779	10,847	17.8%
Average	<b>51,998</b>	<b>7,115.8</b>	<b>14.9%</b>

Source: ANRS - BoCTPD

**Figure 3.2: Inbound tourist flow trend in region.**



The number of non- residents (inbound tourist) visiting the region has been steady increasing and this trend is expected to continue, at least in response to the global trend. It has been rising at a yearly average of about 7,115 tourists or 14.9%, the average yearly flow being 51,998 tourists. In fact, the region's share of the national tourist flow has an irregular trend. It first increases, declines for two years and then increasing slightly. It was approximately 20, 21, 19, 15, 16 and 17<sup>3</sup> percent of the national flow respectively from 2003 to 2008. The detail computation is available in appendix B. This data should, however, be considered keeping in mind the fact that the region's tourism is mainly of leisure nature while the national data includes other forms of tourism like conference, business etc.

Any how the question should be what is this increase attributed to or what are the factors responsible for such a trend. Was it in response to the international trend or due to what is being carried out in the country? This is not an easy question to answer and a further detailed and specific probe in to it may be required. From a limited perspective, however, it is possible to generalize that the trend is more in response to the international trend than conscious activity of the concerned body to achieve it. Though the officials in the region claim that the improvements in service sector as responsible, this can not per se draw tourists in the region. Not only demand

<sup>3</sup> Adjustment on the regional data is made to make it comparable with the national data. The regional data was in Ethiopian calendar and while the national data was in European calendar. The detail is available in appendix B



for service is a derived one but it is still not competitive enough. There is also limitation in communicating the improvements effectively.

Off course, there have been changes in the country over the past decade or so. The country in general and the region in particular witnessed socio-economic development and democratic processes which can favorably contribute to the development of the sector. The increase in tourists flow, then, can be attributed to these and other positive changes. Nevertheless, the most important reason for tourists' visiting the country, it could be reasonably argued, is still its rich cultural and historical heritage. There are a number of reasons for this. First, there is an increasing demand for cultural and historical attractions recently and this trend expected to continue in the future. Second, there are still various problems in the supply of tourist products. Finally, limitation in promotion and coordination of the actors in the sector are other challenges. It is, thus, difficult to attribute the increase in the inflow to the tourism activities actively pursued by the regional government.

This trend requires attention in the future. These additional inbound tourists flowing in to the region require service and the service sector is expected to properly respond to it. The BoCTPD, in collaboration with relevant entities, is responsible body to ensure the balance between demand and supply in the sector. The trend itself can attract investors in the sector. But, the bureau should make available the information to potential investors and use different inducements to attract investment to the industry. In general, the response of the tourism sector to these levels of growth will determine the degree of success and acceptability of tourism in the future.

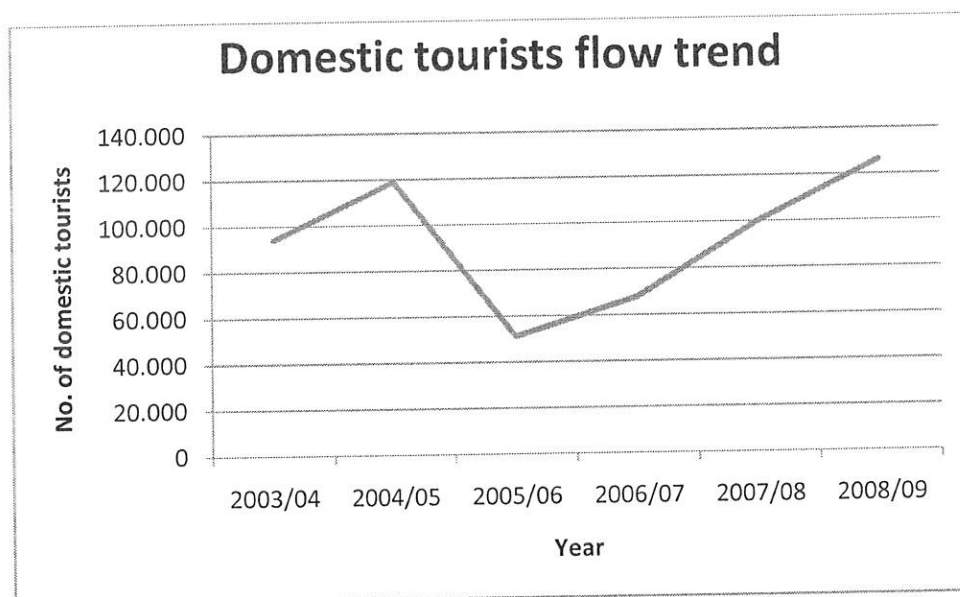
Another important aspect of tourism is domestic tourism, i.e., the flow of those travelling with in their own country. One myth in tourism is that the majority of it is international (Cooper et al 1998: 2). The truth is most of it is domestic than international. In developing nations like ours the economic status of many may make development of domestic tourism difficult. Yet, attempt should be made to wards its development. It is difficult to conceive the development of tourism with out the development of domestic tourism. Below is the statistics of domestic tourism in the region.

**Table 3.8: Domestic tourist flow in the region**

Year	Yearly Domestic tourists flow	Yearly increase (in number)	Yearly percentage increase
1996 (2003/04)	94,011	-	-
1997 (2004/05)	119,004	24,993	26.6%
1998 (2005/06)	51,089	(67,915)	(57.1%)
1999 (2006/07)	67,808	16,719	32.7%
2000 (2007/08)	100,268	32,460	47.8%
2001 (2008/09)	126,261	25,995	25.9%
Average	<b>93,074</b>	<b>6,450</b>	<b>15.18%</b>

Source: ANRS-BoCTPD

**Figure 3.3: Domestic tourist flow trend**



As it is presented above, the domestic tourist flow in the region has an irregular trend. It first has increased from 2003/04 to 2004/05, has shown decrease in 2005/06 and has been rising since then. On the whole, annual average increase has been 6,450 tourists or about 15%. The data, however, is a result of counting made at major religious celebrations such as “Gishen Debrekerbie”, “Gena” in Lalibela, “Timket” in Gondar, “Chirstos Semira”, “Wonkshet Gebriel”, “Dejen Rufael” etc. From the interview held with the head of bureau, it is learned that spiritual

travel association, which infrequently travel to monasteries and churches, are the major players of domestic tourism in the region. Generally, domestic tourism is difficult to measure since it involves movement internally as opposed to international tourism that involve crossing of borders and for which there is entry requirement.

Domestic tourism in the region is basically event tourism, specifically religious event oriented. Moreover, it is mostly, as explained by the bureau head, confined to the movement of region's people except in the case of popular religious celebrations like "Gishen Debrekerbie" that attract people from all the country. This is not what amounts to the development of domestic tourism in its full fledged manner. Effort have to be made to attract people from all over the country for leisure, business etc than only religious reasons. It appears that domestic tourism has been neglected in the region in favor of international tourism. For economic reasons attention has been concentrated on inbound tourism. Domestic tourism should be encouraged not only for economic reasons but for socio-political reasons as it leads to better understanding between people.

There are concerns over promotion for domestic tourism. So far, promotion for domestic tourism is mainly limited to the region. Wall and table calendars, leaflets, photo exhibition are used and their distribution is mostly with in the region. Celebrating World Tourism Day-September 27- using different mechanisms is another promotional method. The regional mass media agency has a biweekly program called "Getsita" which promotes the attractions of the region. Coverage of promotion methods should be extended to all regions of the country. People in all places in the country should be communicated to make them visit the region's attractions. It is obvious that promotion for religious events may not be as such necessary as people have the religious motive.

All in all, it is possible to conclude that domestic tourism is not as such developed not only in the region but also in the country. The country's tourism development policy document (MoCT 2009:19) stipulates that domestic tourism is relatively underdeveloped and limited to family visits and religious celebrations. It remains relatively undeveloped despite the fact that attempts were made for the same. Travel operators are not working on domestic tourism. The officials in the region have acknowledged that it is not developed and explained that efforts are being made to improve the situation.

The development domestic tourism is justified not only from economic reason but also from social and political perspective, particularly in multinational countries like Ethiopia. The seasonality of tourism also makes the development of domestic tourism imperative. The organization of “Know your country” clubs is the strategy adopted. Recently, efforts to organize such clubs in regional government’s institutions are being made. The report of BoCTPD (2008/09: 21) stated that 120 “know your country” clubs has been organized. The bureau is also planning to strengthen the already established clubs. This trend should be expanded to schools, work places, places of worship etc. Above all the clubs must be made active and should be encouraged to travel to different places regularly.

Tourists flow whether domestic or inbound is encouraged for economic, social and other reasons. Economically, it generates revenue, creates jobs etc. The receipts from tourism and flow of tourists are directly related. The receipts will increase with the rise in the tourists’ flow. Most importantly, the length of tourists stay; number of trips made; availability of entertainment; facilities and products etc are the factors that determine the amount of receipt from tourists. Next is the analysis of revenue in the last six years.

**Table 3.9: Revenue trend in the region**

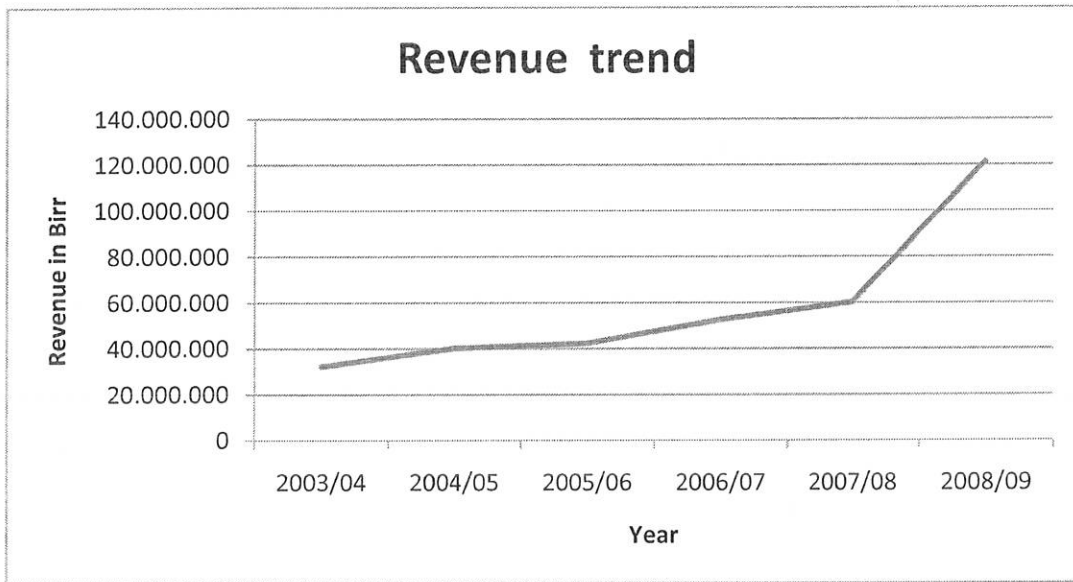
Year	Yearly revenue (in Birr)	Yearly increase (in Birr)	Yearly percentage increase
1996 (2003/04)	32,154,000	-	-
1997 (2004/05)	40,184,000	8,030,000	25%
1998 (2005/06)	42,174,189	1,990,189	5%
1999 (2006/07)	52,591,721	10,417,532	24.7%
2000 (2007/08)	60,135,578	7,543,857	14.3%
2001 (2008/09)	121,340,775*	61,205,197	101.8%
Average	58,096,711	<b>17,837.355</b>	<b>34.16%</b>

Source: ANRS-BoCTPD

\* Includes revenue from Mekiet, Awramba and other secondary attractions of the region

\*The formula for estimating the revenue is adjusted to result such a sharp increase.

**Figure 3.4: Revenue trend**



First of all, an explanation of the revenue of 2008/09 may be required. The adjustment made on the revenue estimation formula, has resulted such a sharp increase in revenue. The growth in the inflow of tourists from 2007/08 to 2008/09 was 10,847 and 25,995 in inbound and domestic tourists respectively while the increase in revenue was Birr 61,205,197 even more than the total revenue earned in 2007/08. This clearly shows that the revenue of 2008/09 is largely a result of the formula adjustment. An attempt to find an explanation for it was made. No other explanation was given than the need to revise the formula arises because the previous formula has a tendency to undermine the tourist receipts.

The receipts from tourists have been increasing steadily corresponding to constant rise in tourists flow. The average yearly increase in revenue was Birr 17,837,355 or about 34%. The average yearly receipt was Birr 58,096,711, providing an average expenditure per tourist arrival of about Birr 1,117. One of the factors that determine the amount of receipts is the average length of stay of tourists in the destination. From the data obtained from the questionnaire, the average length of stay for the sample respondents was computed both for the nation and the region. Accordingly the average length of stay in the country is computed to be 20.5 days while that of the region is

about 11.5 days. However, it may not truly reflect length of stay since the average is affected by extreme values. The length of stay in the region is relatively short since over 66 percent of the respondents stay for less than 5 days. The detail on computation of average length of stay for both the country and the region is available in appendix C.

### **3.3 Image and Promotion**

Image and promotion of a destination are closely related. Image of a destination, i.e., how it is portrayed in the global stage is vital in tourism development. Destination image has been defined as an individual's overall perception or total set of impressions of a place and as the mental portrayal of a destination (Lickorish and Jenkins 1997: 89). Country's image, according to Cooper et al.(1998:170) is people's impressions of country that they do not live at. Building a favorable reflection of a destination is, therefore, highly desirable. This calls for an effective promotion using different mechanism. Promotion, simply, involves communicating what a destination has to offer to potential visitors and encourage and motivate them to visit the destination. Different promotional techniques can be employed to favorably depict the destination to potential visitors, the ultimate objective being attracting tourists to it.

#### **3.3.1 Image**

Before people go to a destination they develop the image and a set of expectations based on previous experience, word of mouth, press reports, advertising and common beliefs. Destination image has been defined as an individual's overall perception or total set of impressions of a place and as the mental portrayal of a destination. Country image, in simple terms, is people's impressions of country that they do not live at. It can also be defines as the sum of tourism experience-related attributes or a set of expectations and perceptions a prospective travelers has about a destination (Cooper et al 1998: 171; Lickorish and Jenkins 1997: 89). In general, the image of destination is the individual perceptions of the characteristics of destinations and that can be influenced by promotional information from the destination, news media as well as many other factors.

**Table 3.10: Image related questions**

Question and Answers	Frequency	Percentage
<p>What was your image of Ethiopia before coming to the country?</p> <ul style="list-style-type: none"> <li>• Extremely negative</li> <li>• Negative</li> <li>• Positive</li> <li>• Extremely positive</li> </ul>	<p>3</p> <p>36</p> <p>19</p> <p>2</p>	<p>5.0%</p> <p>60.0%</p> <p>31.7%</p> <p>3.3%</p>
	60	100%
<p>Have you been indecisive of coming to the country and to the region particularly due to the negative image you had?</p> <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>	<p>33</p> <p>6</p>	<p>84.6%</p> <p>15.4%</p>
	39	100%
<p>If you had a negative image, do you believe that the image you had represents the realities in the country and the region?</p> <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>	<p>8</p> <p>30</p>	<p>21%</p> <p>79%</p>
	38	100%
<p>Are you satisfied with your visit of the region and the country in general?</p> <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>	<p>46</p> <p>13</p>	<p>78%</p> <p>22%</p>
	59	100%

Do you consider coming back to the country and the region in the future?		
<ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>	31	54.4%
	25	45.6%
	57	100%
Would you encourage others back home to visit the country and the region?		
<ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>	41	68.3%
	19	31.7%
	60	100%

Obviously, the primary consideration of tourists when making a travel decision to a destination is their perception of the destination area, i.e., the image of the area. The way a particular destination represented in the world stage is the crucial factor in development of tourism. It directly affects the visitors' decision to travel or not to travel to a destination. This is particularly true for international tourism where there is a need to visit a foreign country. As far as the image of our country is concerned, it has been an example for all wrong reasons- famine and drought, war, diseases. Of the respondents 60 and 5 percent respectively had negative and extremely negative image before coming to the country while about 32 and 3 percent of them have been positive and extremely positive respectively. Unless properly addressed, this wide spread negative image will prevent visitors from traveling to the country and eventually obstruct the development of the sector.

Even from those who visited the country and the region, there were many who, at times, were indecisive whether to travel or not. This was essentially due to the negative impression they had about the country. This is apparent in the above table. About 85 percent of the respondents with bad impression were indecisive to visit the country whereas the remaining 15 percent were confident to travel the country. Luckily, these people have visited the country despite the unfavorable representation of the country they had. The possible justification would be these



visitors might be either risk takers or changed their perception by seeking additional information. However, this will not always hold. There are many tourists who might be risk avoiders. Still there are people who do not actively seek information. Largely, the responsibility of looking for information about the destination should not be left to tourists in the first place. One of the major duties of the governments is to effectively portray their country to potential tourists.

Another issue relating to image is the fact that the country is wrongly perceived by tourists. From the above table, it can be seen that most of the respondents with negative image, about 80 percent, do not believe that the image they had correctly represent the realities on the ground. Arguably, they had a wrong perception of the country and what they experienced after coming to the country is different from their perception of the country. Not only are most tourists (78 percent) satisfied, about 54 percent hope to come again. There are still others, about 68 percent who will encourage others to visit the country and the region. This is undoubtedly the reflection of poor promotion of the country and its tourist attractions.

It undeniable that Ethiopia is a third world country but it has a lot to offer for tourists. Off course, it in the past had problems- recurrent famine and drought, war, antagonistic political ideology with tourist generating regions etc. The country is now changing. It is relatively stable, registering continuous economic growth, improving infrastructure etc. Above all, it is reasonably safe, posing no potential threat to tourists' wellbeing. It is, therefore, possible to argue that the country is being perceived by its past. As discussed above, most of the tourists had negative impression of the country before coming to it. As a result of this, many tourists have been indecisive of traveling to the country. But these tourists have changed their mind after coming to the country. Most of them are satisfied with their travel. The likely logical explanation for all these is the concerned body, MoCT in this case, did not present the country properly. In simple terms, the country is not promoted very well. The forth coming discussion deals with promotion.

### **3.3.2 Promotion**

Promotion of a destination involves effectively communicating to potential travelers what a destination has to offer, keeping in mind the ultimate objective of motivating them to visit the destination in question. Market research is required to determine such things as the target population, the method to use, effectiveness of the methods used etc

**Table 3.11: Promotion related questions**

	Frequency	Percentage
How do you come to Ethiopia?		
• Independently	34	57.7%
• Through Tour operators	22	36.6%
• Others	4	6.7%
	60	100%
Where did you get information about the Ethiopia and its tourist attractions?		
	-	-
• TV ads	15	25.0%
• Internet	3	5.0%
• Trade fairs	5	8.3%
• Ethiopians abroad	20	33.3%
• Friends & relatives who visited Ethiopia before me	7	11.7%
• Other	10	16.7%
• Combination of methods		
	60	100%

The linkage between the producers of tourist product and their potential consumers can either be direct or indirect. At times tourists can buy the components of the tourism trip [accommodations, transport, excursions and entertainment] directly from producers. This are called independent travelers. At other times, tourists may leave the job to intermediaries who assemble the main component of the tourist trip in to a single product. Among the respondents about 58 percent put their own tour itinerary together, i.e., they travelled to the region by their own. Those who used the service of tour operators were about 37 percent. There were also others, about 7 percent, who used other mechanisms like family or friends' invitation, organizational arrangements. In fact, this is an informal situation that can not be explained in marketing terms.

In any case, most of the visitors in the region are found to be independent travelers. It is not a problem per se but throws light in to the operation of tour operators. In countries like Ethiopia, tour operators are expected to play a major role at least in principle. The justification is the potential benefit the effective operation of tour operators bestow to such countries. The irony in destinations in developing countries is the need to promote their attractions and financial limitation for the same. Destinations in developing countries, therefore, may benefit considerably from the international marketing network of tour operators.

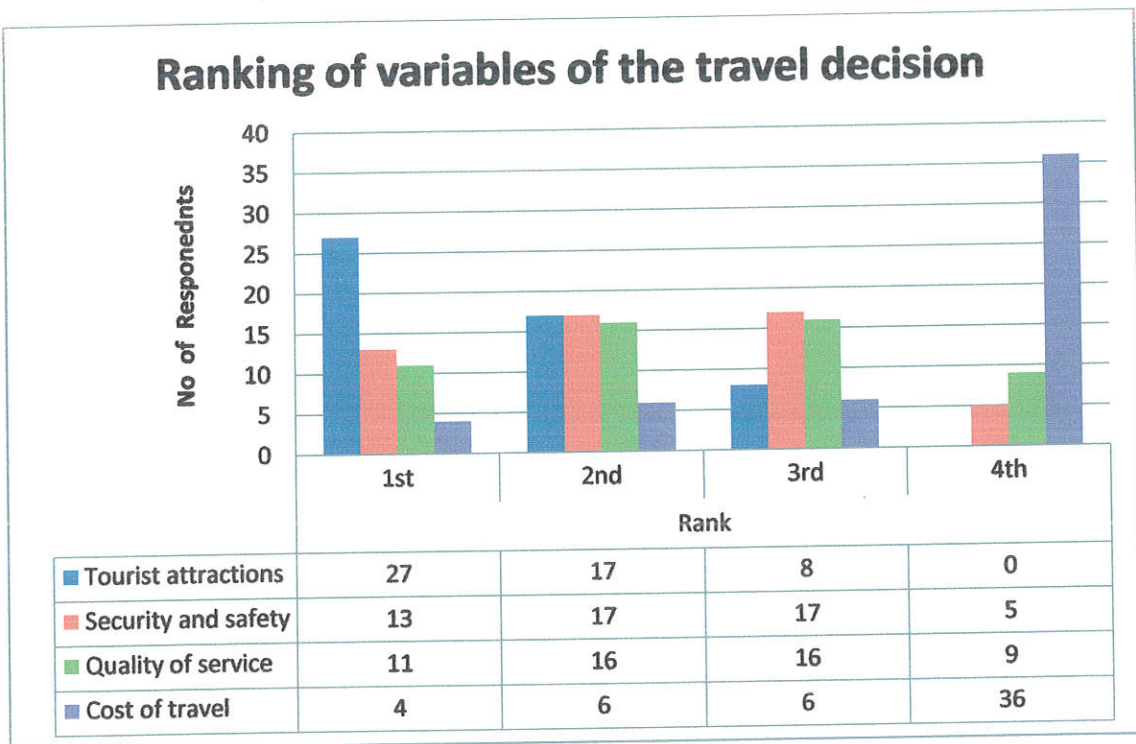
A report from the MoCT (2009: 14) indicates that there are currently about 170 tour operators certified by the ministry. In addition, there are many others who took license directly from the Ministry of Trade and Industry (MoTI). Region wise, there are about 20 tour operators and travel agents in major tourist destinations. This may be considered a fairly large number and large number induces fierce competition which is desirable. The concerned body may even need to induce, through different methods, more investors to join the business. But their effectiveness is more vital than numbers. This argument can further be justified from the existing limitation in marketing and promotion. Formulating and implementing of relevant legislations and standards for certifying, controlling and even rewarding such business is an important step. Such draft regulations are being formulated in Amhara region. In addition, the concerned tourism body needs to closely work with them. The detail study of the operation of tour operators is out of the scope of this paper.

In terms of source of information for tourists, the above table reveals that respondents obtained information about the country and its attractions from different sources. Friends and relatives and who have visited the country before the respondents and internet are the major sources of information. About 33 and 25 percent of the respondents obtained information from these sources respectively. Trade fairs, Ethiopians living abroad and other sources constitute about 5, 8, and 11 percent respectively. Those who used a combination of the above methods were about 16 percent. The responsibility for carrying out promotional activities is that of MoCT. To learn about the promotional activities being carried out, interview was made with a marketing expert from MoCT.

reveals that Western Europe and North America are the major tourist generating areas for the region. The tourists flow data of certain years can also result the same information. Nevertheless, the promotion should be directed not only on tapping the existing tourist generating areas but also emerging ones. The next step is identifying what method to use. As discussed above effective promotional methods should be selected on the basis of a number of factors

The content of the promotional method should take in account the needs of tourists. After all people travel to satisfy their needs. These needs have to be clearly identified and an appropriate message for the same has to be designed. The promotion, among other things, should emphasize the major variables tourists consider in their travel decisions. As figure 3.5 unveils attractions, security and safety, quality of service and cost of travel in order of their importance are found to be the major variables. For example, 52, 33 and 15 percent of the respondents ranked attractions as first, second and third major variable respectively in their travel decision. From this information it can fairly be generalized that the promotional activities should stress the tourist attractions, security and safety, the quality of service etc.

**Figure 3.5: Ranking of some variables in travel decision**



The promotional activities are carried out by Tourism Market Development Directorate of the MoCT. The ministry employs varied techniques. However, it chiefly relies on print oriented promotional mechanisms such as a guide book, brochures, leaflets etc. These instruments are available in the information center in Meskel Square or can be sent to tourists by post on demand. The ministry has also a web-site and that tourists' question will be replied via e-mail. Occasionally, the ministry participates in trade fairs held in major tourist generating areas. The directorate rarely sponsors travel journalists to visit the country with the expectation they will write on their respective journals about the country.

Third party promotion through Ethiopian Airlines and embassies and consulates under Ministry of Foreign Affairs (MoFA) is another mechanism. As a major player in transportation, the Ethiopian Airlines provide information to visitors. It offers information of the attraction, entry requirements etc in its web site and ticketing offices abroad. Inbound tourists can also obtain travel related information from Ethiopian embassies and consulates. Embassies and consulates have web sites for the same. After all, it is these structures which issue visa or entry permit to tourists. Supplying information to tourists, nevertheless, is a secondary activity for these third parties. Even if helpful, third party promotion can not be relied on as an effective tool in itself. In deed, it is supplementary to what is done by the tourism body.

There are a number of issues of concern relating to promotional methods being used. First and for most, no market research has been carried out for adopting the above methods. They were simply adopted long ago and remain traditions since then. In theory, promotional methods have to be chosen keeping in mind a number of considerations like coverage, appropriateness, accessibility etc. Second, evaluations as to their effectiveness have not so far been carried out. It is vital to check of whether techniques are paying off or not since they have purposes to meet- attracting more tourists- and money is spent on them. Otherwise, there is no meaning in adopting different promotional method and it will also be unnecessary waste of resource.

In general, it is possible to conclude that systematic approach to promotional activities is lacking. Information on whom to target; what method to use; what should be the content of the message; how to brand the country etc are being given the required attention. The identification of major tourist generating is the first activity. Market research is the tool. For example, Table 3.12

The information on the next table and the accompanying discussion also has promotional implication.

**Table 3.12: Preliminary Information of the Respondents**

Item		Frequency	Percentage
Age category	<20	-	-
	21-30	12	20.0%
	31-40	11	18.3%
	41-50	8	13.3%
	51-60	13	21.7%
	61-70	16	26.7%
	>70	-	-
		60	100%
Sex	Male	39	65%
	Female	21	35%
		60	100%
Country	Europe	36	60.0%
	North America	14	23.3%
	Latin America	1	1.7%
	Asia	4	6.7%
	Africa	3	5.0%
	Oceania	2	3.3%
		60	100%

The above table indicates that the respondents represent almost all age group. In actual terms, all of the respondents are between age 21 and 70. It can, thus, be fairly generalized that it is basically people under the working age category who are traveling to the region. A further generalization could be people commonly travel more when they get older and older. It is clear from the above table that the percentage of visitors increases with the increase in age. Roughly over 60 percent of the respondents are above the age of 40; about 48 percent are above age of 51 and those above 61 alone constitute about 27 percent of the respondents. In fact, one of the reasons provided by many for the rapid growth of the industry is the increase in the old age population. 65 percent of the respondents are male and the rest are female, providing female to male ratio of about one to two.

The 3.12 also depicts that most of the respondents are from Europe and North America, each accounting 60 and 23 percent respectively. Off course, Western European countries, USA, Canada are popular tourist generating regions not only because they are economically strong but also because they have that long tradition of travelling. Asia, Africa, Oceania and Latin America all together constitute only about 17 percent of the tourists visiting the region. One of the implications of which is the country's attractions in general and that of the region in particular are not well promoted in these places. Countries like China, Japan, Australia, South Korea etc are among the international top spenders. China, for example, is the world's fifth spender in 2007 (WTO 2008:9) Therefore, we have to reconsider our promotional strategy in a way to reach out all potential tourist generating areas as much as possible.

### **3.4 Service**

Since tourism always involve movement of people –usually out side of their usual residence- tourists require different services. Essentially, tourism is a service industry. First, tourists need transportation service not only to and from a destination but also with in the destination. The hospitability sector is another major component of the tourism industry. It provides them with accommodation, food and beverage etc. Intermediaries that provide tour related services are also major players. Being in a strange place, they also require information on various issues. On the whole, tourism industry predominantly a service industry consisting of the above mentioned and other services.

### 3.4.1 Transport Service

The chief mode of travel to Ethiopia for tourists is by air, and the main carrier is the Ethiopian Airlines, which deservedly has a fine reputation for service. Major international carriers such as the Lufthansa, Emirates Airline, South African Airways, Alitalia and Kenya Airways also land at Addis Ababa, the principal gateway to Ethiopia. According to Euro monitor International report (2009: 4) Ethiopian Airlines is the national flag carrier and also market leader in value terms. The same report reveals that transportation remained the largest sector in Ethiopia's travel and tourism market in current value sales. Transportation current value sales continued to grow strongly in 2008 thanks to the positive performance of air travel, which dominates the sector and is the means by which the vast majority of tourists arrive in Ethiopia.

**Table 3.13: Transport related questions**

Questions	Frequency	Percentage
Did you encounter problem of getting transport to come to the region?		
• Yes	20	33.3
• No	40	66.7
	60	100
How about getting transportation to move from place to place with in the region?		
• Yes	46	76.7
• No	14	23.3
	60	100
What mode of transport did you use to come to Amhara region?		
• Air	24	40
• Land	36	60



	60	100
What type of land transport did you use to move from one destination to another with in the region?		
• Rented cars	12	33.3
• Public transport	19	51.7
• Other	5	15.0
	36	100
Did you often face problems related to public transport like delays, over pricing and other inconveniencies in the region?		
• Yes	12	65
• No	7	35
	19	100

From the respondents it appeared that tourists usually face problem of getting transportation in moving from place to place with in the region, not to travel to the region from Addis Ababa. This is evident in the above table where about 67 percent of the respondents believe that they did not encounter any problem in getting transport to travel to the region. Those facing difficulties in getting transportation with in the region constitute about 77 percent of the respondents. Road and air are the two modes of transportation to travel to the region and the respondents who used these modes of transport respectively were 60 and 40 percent. Among land transport users, about 65 percent used public transport to move from place to place in the region, of which 51 percent faced problems like delays like overpricing, delays and other inconveniencies. There may be a number of explanations for this difference in transportation to the region and with in the region. The major ones are the condition of infrastructure and the carrying units.

Road and air are the two modes of transportation to travel to the region. The easiest and quickest way to get to the region from Addis Ababa is to fly. Domestic air travel service is rendered mainly by the Ethiopian Air Lines using Boeing and Fokker jets as well as smaller aircrafts.

There are air ports at Bahir Dar (recently made an international air port), Gondar and Lalibela. Flights are available on daily basis.

Those with more time and who want to see more of the surrounding countryside may chose to do all or some parts of their journey by road. Improvement in road transport both in the road infrastructure and carrying units has occurred. In an effort to improve its infrastructure of roads in the country, a ten year Road Sector Development Program was carried out by the government. It was carried out in two phases from 1997- 2007 with an expenditure of six hundred billion Birr. The third phase is already under way since 2008 (ERA 2009: 4). Accordingly, the towns around the major destinations like Bahir Dar, Gondar, Debarke and Lalibela are connected to the Addis Ababa with asphalt roads. Every day, public transport buses leave Addis to major towns in the region. A recent good development is establishment of tourist standard bus lines- Selam Bus Lines Share Company and Sky Bus Systems Share Company. The former serves towns like Bahir Dar, Gondar and Dessie on daily basis while the later travels only to the first two towns. The future looks bright in this respect as more similar business are expected to open.

Transportation within the region is a different story. It appeared that there are some challenges in it. Gondar, Debarke, Lalibela have asphalt roads while Blue Nile falls (“Tis Isat falls”), Zege Peninsula and other secondary attractions are connected to the near by towns with gravel roads. There are numerous reports of incidents of hazard in Lake Tana boat transports. Local buses ply all major roads in the region and vary from uncomfortable to hellish. Majority of the respondents, about 77 percent, reported that they had faced problems in getting transport to move from place to place within the region. Road transport in the region is marked by other problems as 65 percent of the land transport travelers replied there were delays, overcharging and other inconveniences.

### **3.4.2 Accommodation and Other Amenities**

Since tourism entails moving away from one's usual residence, tourists require a location where they can rest. Thus, accommodation or lodging is an important sub-sector in tourism. In fact, the demand for accommodations, as other services, is a derived demand. It provides a support service for the wider motivation which has brought the visitor to a destination, whether for

business or leisure purpose. Businesses in the accommodation sub-sector also provide other related services. For example, hotels have always been major providers of not only food service but also leisure, sporting, entertainment facilities and business and conference services. In addition, there are hotels in the region which engage in tour operation, souvenir and gift shops etc. In general, accommodation is a necessary component in the development of tourism with in any destination that seeks to serve visitors.

The quality and range of accommodation available will both reflect and influence the range of visitors to a location. Clearly, accommodation is one of the vital issues that go to tourists travel decision to a destination. Hence, a destination has to equip with appropriate accommodation to serve tourists travelling to it. Even though a number of variables can be used to assess the state of the accommodation sub-sector, availability and quality can be used at a simple level of analysis. It is also worth noting that the sub-sector is marked by its heterogeneity in terms of size, function etc. and an attempt to generalize about the sub-sector should take variability in to account.

**Table 3.14: Accommodation**

Questions and Answers	Frequency	Percentage
Did you face problems in getting accommodation?		
• Yes	15	25.4%
• No	44	74.6%
	59	100%
Have the accommodations been clean and comfortable?		
• Yes	26	44%
• No	35	56%
	59	100%
Have you suffered from health problem relating to accommodations?		

• Yes	14	24%
• No	44	76%
	58	100%

It is evident that the visitors do not face problem in getting accommodation in regions. Asked if they have faced problem of getting accommodations, approximately 75 percent of the respondents replied that they had no problem of getting a place to stay. Yet, about 25 percent responded “yes” to the same question. This, however, does not mean that they stayed out in the street or any where. Rather, either it was not easy to get or accommodations did not meet their expectation. It is also possible to assess accommodations from quality perspective like cleanness, comfort, safety etc. Perhaps, the response to the question of comfort and cleanness is close proportion. Those responded affirmatively constitute 44 percent of the respondents whilst 56 percent replied negatively. With regard to safety, 76 percent did not suffer from health problems relating to accommodations whereas the rest have suffered from different health hazards.

The above statistics relating to accommodations may be considered good records especially compared to the problems in the past. But they are never to be proud about. In the last couple of years, there has been an increase in the number of hotels in the major tourist destination of the region. For instance, hotel and tourism projects with a capital of Birr 1,263,731,000 had commenced in 2006/07 and 2007/08 (BoCTPD 2008/09: 7). Tourists flow in the region has been increasing too. This is an important development that leads to virtuous circle. The growth in tourist flow attracts investors in to the sector. The resulting rise in the number of hotels intensifies the competition at least in principle. In the face of stiff competition business in the accommodation sub-sector are required to improvement their services to stay competitive and attract more customers. Improvement in service, then, contributes to satisfaction visitors there by attracting more tourists. See appendix D for details on hotels, pensions and restaurants around major destinations.

The condition in SMNP is different the main accommodation is camping except Semien lodge and Sankaber lodge. Equipments necessary for camping tents, sleeping bags, mattresses,

raincoats etc can be rented. In SMNP there are several camping sites both inside the park and in the buffer areas are generally. Inside the park, there are three well- established campgrounds at “Sankaber”, “Gich”, and “Chenek” (which are run by the park office) and community owned camp sites like “Adisgie”, “Gich” and “Chenek”. For more extensive hiking in the buffer area, particularly in the highlands, four campgrounds are also available for tourists at “Ambiko”, “Menta Ber”, “Arquaziye” and “Sona”. “Adarmaz”, “Muchila”, “Dirni”, “Mekarebya”, “Muli”, “Aykotba”, “Tiya”, “Amiwalka” and “Adebabay” are camp sites along the paths following the foot slopes of the escarpments, and for more extensive hiking in the low lands (BoCTPD 2008/09 :13).

However, there are still number of concerns over quality and services and hence a long distance to go. In principle, tourists should not be concerned about getting an accommodation as it is indispensable element of travel and they expend about 30 percent of their total expenditure on it. Yet, there are fairly large proportion of respondents (25 percent) who found it either difficult to get an accommodation or lodgings are below their expectation. A related tourists’ distress is comfort and cleanness of accommodations as reported by considerable proportion of the respondents (44 percent). Safety is another vital dimension of quality that tourists should be granted at minimum. Not small number of respondents (24 percent) had suffered from health problems relating to accommodations.

Tourists also need food and beverage in their travel process. Hotels, restaurants, bars etc in and around destinations cater these services to tourists. Due to its special context, there is a need to cook in SMNP except at Semien and Sankaber lodges. Tourists can either cook themselves or hire people for the same. There are associations that provide cooking service in Gondar and Debark. Cooking gears can be leased. Hikers, however, should be adequately equipped with food staff which can be easily available from Debark. Food items like local chicken and eggs can be supplied from the communities living inside and outside the park through purchase. Though all camp sites have water sources, tourists should bring disinfectants to rid contamination.

**Table 3.15: Food and beverage**

Questions and answers	Frequency	Percentage
Do you believe that you had enough choices of food and drink in the menu of hotels; restaurants etc from which you can pick what you prefer?		
• Yes	22	36.7%
• No	38	63.3%
	60	100%
Have you suffered from health problems due to food related causes?		
• Yes	15	25%
• No	45	75%
	60	100%
Did you get the necessary medical treatment and cured?		
• Yes	8	53.3%
• No	7	46.7%
	15	100%
How often did you face the health problems?		
• Once	11	73.3%
• Twice	4	26.7%
• Three times	-	-
• Four times	-	-
• More than four times	-	-
	15	100%

The data in table 3.15 indicates that about 63 percent of the respondents believe that they are limited choices of food and beverage in hotels, restaurants etc and had difficulty of getting food and drink of their preference where as the rest are happy about it. With regard to safety, about 25 percent of respondents had some kind of health problem out of food related causes, of which 53 percent got the necessary medical treatment and cured while the rest did not. The frequency of the incident has been once and twice for about 73 and 27 percent of the respondents who suffered from health hazards respectively.

This is a potential set back for the region's tourism industry and has to be addressed with no time to waste. Adequate choice of food and beverage may not be available but tourists' health should not be compromised by any means. It calls for a serious measure by the concerned body as one out of four visitors is vulnerable to some form of health hazard. What is required is effective supervision hotels, restaurants by the concerned body is required. Draft regulation for supervising service providing institutions is already completed. Accordingly, a minimum standard for licensing hotel service is developed by the bureau.

**Table 3.16:- Overall service rating**

Questions and Answers	Frequency	Percentage
How do you see the overall level of services in the region?		
• Extremely poor	2	3.3%
• Poor	22	36.7%
• Average	28	46.7%
• Good	8	13.3%
• Excellent	-	-
	60	100%
Have your complaints over poor service been properly and promptly addressed by the concerned body?		
• Yes	24	40.7%

• No	35	59.3%
	59	100%
Do you feel that you have been overcharged or overpriced for services and products in the region?		
• Yes	42	70%
• No	18	30%
	60	100%

In addition to accommodation and food and beverage, attempt was made to assess the tourists' view of the overall service in the region in terms quality, complaint handling and pricing. The table above depicts the responses of tourists. The tourists rating of the overall level service is not quite encouraging. The ratings are extremely poor, poor, average and good which respectively constitute about 3, 37, 47 and 13 percent of the respondents each. On top of it, nearly 41 percent of them believe that their complaints over service been properly and promptly addressed. The above are not the only challenges of the service. The tourists also felt that they have been overcharged relative to the offering.

As explained earlier, there are issues of concern relating to accommodation, food and beverage and overall level of service. Difficulty in getting lodging, low standard accommodations, comfort and sanitation problems and health hazards are some of the setbacks of lodging sub-sector. The quandary relating to food and beverage include limitation in choice, health hazards of one to three frequencies etc. The status of the overall service is not all that different. It has been rated poor by almost 40 percent and average by about 46 percent. Besides, over pricing and complains over service not being addressed properly and promptly. With no doubt, these and other issues put a great challenge on the sector there by affecting its development.

One mechanism for dealing with it is through attracting more investors to the sector. Different inducement like take tax holidays, low interest credit, low lease price etc could be offered in addition to providing concrete information to investors about the potential of the sector. Research



based investment alternative information that can assure investors of their future success is very much helpful in this regard. With more and more investors coming to the sector, the competition will become tough, putting pressure on all business to be competitive enough. Offering what is good for ones customers will do the miracle. This ultimately leads to improvement of service in the sector.

As a matter of fact, service improvement requires facilities, manpower etc. Improving facilitates and other related issues are left to the investors themselves. In tourism industry because of specific nature of its product, customer satisfaction is highly dependent on employee relationship with the customers as well as many other aspects. A government can play a central role in the supply of manpower for the sector as good service requires skilled manpower. Given that the sector is marked by shortage of manpower, training of skilled manpower should be a priority for the tourism body.

There are different institutions that are providing training in tourism related fields both at national and regional level. Jimma University, Catering and Tourism Institute, Lion Ethiopia Tourism and Hotel College etc are among such institutions out side of the region. Training institutions in the region include Gondar University and TVET colleges. Besides, there are private institutions like Ambassador Hotel and Tourism College, Sqaufair Hotel Institute. Table 3.17 indicates the institutions in the region that offer middle and lower level training

**Table 3.17:- Training institution and types of training**

Name of the institution	Types of trainings	Level of training	Place of operation	Year training commenced
Different TVET Colleges in the region	Food and Beverage	Level 3	Bahir Dar	2007/08
	Front Office Operations	Level 3	Gondar	2008/09
	Hotel management	Level 3	Dessie	2007/08
	Tour Guiding	Level 4	Debremarkos	2007/08
	Travel Operation	Level 4	Debrebirhane	2008/09
Ambassador Hotel and Tourism College	Food Preparation	Level 2 & 3	Bahir Dar	2008/09
	Tour Guiding and Operation	Level 2 & 3		2008/09
	Hotel Management	Level 2 & 3		2008/09
Sqaufair Hotel institute	Food preparation	Level 2 & 3	Bahir Dar	2007/08
			Gondar	2008/09

Source: ANRS -Technical and Vocational Education Training Promotion Agency

### **3.5 Information Provision and Tourists' Interaction with Local People**

Information of the tourist destination including attractions, accommodations, transportation and other services plays a pivot role in tourism management. Effective provision of tourist information before and after their visit determines the development of the sector. On one hand, information to arouse interest on tourists to visit the destination is required. This refers to promotion which is mainly dealt under topic 3.2. Tourists also need relevant information after their arrival. This information will empower tourists and allow them to make informed decisions, there by contribute to their satisfaction.

**Table 3.18: Information provision**

Questions and Answers	Frequency	Percentage
Are guide books on Ethiopia adequately available at an affordable price?		
• Yes	37	65%
• No	20	35%
	57	100%
Do you think that tourist information easily and adequately available in the region?		
• Yes	24	41.4%
• No	34	58.6%
	58	100%
Have you visited any of the information centers in the region?		
• Yes	36	60%
• No	23	40%
	59	100%
Are tourist information centers adequately available and easily accessible if you have visited one?		
• Yes	11	30.6%
• No	25	69.4%
	36	100%
Did you use the service of local tour guides in the region?		
• Yes	38	64.4%
• No	21	25.6%

	59	100%
Are they qualified, integrative and provide good service?		
• Yes	11	28.9%
• No	27	71.1%
	38	100%

Tourists can obtain information from different sources such as guide books, information centers, and local tour guides. With regard to availability of guide books, the majority of the respondents (65 percent) think that guide books are adequately available at an affordable price. There are two prominent guide books about Ethiopia- *Lonely Planet's Ethiopia and Eritrea and Ethiopia: Bradt Travel Guide* written by foreigners. *Spectrum Guide to Ethiopia* is another guide book prepared by MoCT in 2001. All of these books are criticized for being old and hence do not project the country as it stands at present. Up to date information of accommodations, places to visit, how to get to those places etc should be available to visitors. One of the achievements of the BoCTPD is the preparation of a regional guide book. Not only this regional guide book solves the above problem but also provide specific information for tourist. More over, it is available in the regions web site ([http://www. Amharatours. com](http://www.Amharatours.com)) and any one interested can down load it for free.

Among the important responsibilities of government bodies in charges of tourism is provision of information to tourist. Usually, this carried out through information centers organized by those bodies either inside or outside of the country. Unfortunately, the country has no any information center abroad. At national level there is one at Meskel Square. Amhara region BoCTPD has organized four tourist information centers at Bahir Dar, Gondar, Tis Abay, and Lalibela. The centers provide information to tourists and distribute brochures, leaflets, maps etc and collect feedback from tourists. At Debarq town, there park's visitor center provide information, maps, brochures, local guides, mules for rent, scout gun-men etc.

With respect to tourist information centers in the region, above table provide the following data. About 59 percent of the respondents do not believe that tourist information is adequately

available. Given the role the information available to tourists play in the travel process, this could be considered a fairly large figure. One of the reasons for this could be the availability and accessibility of the information centers. From among those who visited the centers about 69 percent do not consider that tourist information centers are adequately available and easily accessible. This being the case, the bureau has to take measure to alleviate these concerns of tourists. After all the centers are intended for providing pertinent information for tourists and they have to accomplish this effectively.

As a matter of fact there are also other concerns like under capacity; lack of needed equipments; poor reporting and feed back mechanisms etc. For example, information is only provided in English while there are many tourists who request to be briefed in their own language like French, German etc. The head of the bureau acknowledged the fact that centers are not well capacitated. He, however, explained that the problems are identified in the BPR and will be dealt with effectively in the future.

An attempt to obtain report of number tourist served by the respective centers from the bureau was turn out to be unsuccessful. From personal visit to Bahir Dar and Gondar tourist information centers, it was found that it was only Gondar center that regularly report to the bureau. Accordingly, 89, 105, 118, 189, 332, 235 and 292 foreign tourists were served from September to March of the current year respectively (local calendar). Domestic tourists served during the same period were 20, 16, 22, 18, 43, 34, and 26 respectively. The information personnel in Bahir Dar gave an explanation that he is new to the job and has no knowledge of the reports of the past.

Another problem is the lack of a proper feed back management mechanism. In both of the centers- and possibly in all of them-, there are documents where tourists are supposed to put their comments and suggestion of not only the centers but also of their whole experiences. However, the information is not reported to the concerned body for the necessary action. It has been learned that mostly the comments and suggestions are not included in the report of the centers. Even, when reported they are not taken very seriously and actions are not being taken. Tourists, for example, many times complained about tourist police in Gondar that accompany them in SMNP and illegal local tour guides. Similarly, there are complaints on tour guides and boat service provides in Bahir Dar.

Tourists can also get the service of local tour guides in and around destinations. There has been number of problems with local tour guides and a number of measures have been taken to alleviate them. Trainings have been provided to them. Local guides have to pass tests before they are licensed. They are also organized in to associations in all the major tourist destinations of the region. Recently, all certified guides are required to wear badges so as to identify them selves from illegal ones. However, the data from the questionnaire tells a different story. Among 38 respondents who used local tour guides' service, 71 percent are not satisfied. Local tour guides are considered not qualified, integrative and as result provide poor service.

All the above measures are important in terms of improving local guides' service. Yet, they do not confer the required result if not accompanied by effective control. They are never enough to ensure good service. It is conformed that there are still a considerable number of illegal guide that hassle tourists. No legal framework to punish them and police do not intervene on regular basis. So far, it is left to tourists to identify guides who are certified, through their badges, from those who are not. Tourists also reports of harassment and ethical problems among the licensed ones. Trainings on ethics should be provided. A draft regulation for the control of tour guides is prepared and things are expected to improve with its adoption. The concerned tourism body should closely work with the tour guides associations and other parties to solve the problems.

Tourists' satisfaction is a function of many variables like attractions, services, information etc. Another variable that can affect tourists' satisfaction is their interaction with the local people. The following discussion assesses the tourists interface with people around destinations.

**Table 3.19: Tourists' interaction with local people**

Questions and answer	Frequency	Percentage
Have you been stolen, cheated, intimidated or attacked in the region?		
• Yes	26	44%
• No	33	56%
	59	100%

Do you believe that local kids and people made your visit difficult through hassling, calling, following and begging?		
<ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>	37	61.7%
	23	38.3%
	60	100

Table 19 indicates 44 percent of the respondents reported that they had faced incidents of cheating, stealing, intimidation etc. With no doubt, this is a sign that a considerable concern exist in the dealing of tourists with the local people. Besides, about 62 percent of the respondents believe that their visit was made difficult by local kids and people. Hassling is still a challenge for the sector in the region. Local kids call and follow tourists creating a further disappointment. Beggary is another factor that presents a challenge to the travel experience.

The head of the bureau claimed that these problems are decreasing and mentioned what has been done in Lalibela as an example. One specific place was designated for begging with in the churches and beggars are not allowed to follow tourists. This is some thing to be appreciated. It has to be duplicated in other attractions of the region. However, it is only the tip of the iceberg compared to the extent of the problem. Beggars can follow tourists in step their visit in and around a destination. There are local kids and others who call and follow tourists with out knowing the harm they are causing tourists. Something has to be made about it. Reducing the hassling problem also require effective control over service providers like guides.

Part of a visit to a destination is having some kind of experience with the local people. From the above data, however, it is difficult to conclude that tourists had good interaction with the people in the region. The researcher himself observed how tourists are reserved during data collection. Distributing questionnaires was difficult because the tourists were often unwilling to cooperate probably perceiving him as one trouble makers. What has been done so far may not be enough to alleviate the problem and more has to done in the future. Above all, study of what tourists like their interaction with local be and actions should be based on the findings.

### **3.6 Protection and Preservation of Heritages**

It is straight forward that tourism is a resource based industry. It depends on different natural and man made attractions. Man made heritages are further classified as movable and immovable heritages. Attractions are integral to the tourism product, often, providing the single most important reason for leisure tourism to a destination. They include landscape, water bodies, climate, vegetable, wildlife, religion, museums, architecture, art galleries, archeological sites, festivals etc. Unfortunately, tourism by its nature, unless properly managed, represents an industry that tends to erode or even damage the very resource it relies up on.

These resources that serve as the base for tourism industry have to be protected and be commercialized. They must be preserved for the future generation too. As a matter of fact, there are various threats putting the heritages under pressure. Non movable heritages have to be safeguarded from damage, deterioration while movable heritages should be protected from vandalism and plunder

The causes for the damage of these resources are classified as natural or man made causes. Wind, earth quakes, land slide, fire, flood etc are among the natural causes while fire, war, plundering and overcrowding or unacceptable utilization rate are man made threats. The preservation of these resources of historical and cultural value is among the vital issues in tourism management. It is a two fold activity. On one hand, heritages have to be protected from vandalism as a result of such threats as fire, land slide, flood etc and movable heritages from plundering. On the other hand, heritages that may be deteriorating through aging or damaged by those threats need maintenance.

To assess the state of conservation of heritages in ANRS interview with the Heads of BoCTPD, North Gondar Culture and Tourism division, Bahir Dar City Culture, Tourism, Labor and Social Affairs Office and officials of West Gojjam and North Gondar dioceses of the EOC was made. The following discussion, therefore, is based on the responses of these officials. In addition, secondary sources of information have been consulted.



### **3.6.1 Protection of Heritages**

From the interview held with officials, it is learned that different heritage protection activities have been carried out in the region. It is explained that protection of movable and non-movable heritages from different threats are carried out every year. However, the level of protection, they agreed, is not at a required level due to financial limitation, lack of active public participation, skilled man power etc. In spite of this, the government officials replied that they are doing their best to protect the region's heritages. For handling this duty effectively, the Bureau has organized two major structures called Heritage Study and Information Organization and Heritage Protection and Maintenance.

As far as the protection of movable heritages is concerned, the respondents explained that there are numerous problems. The most repeatedly mentioned problem is the state of management of the heritages in churches. It is considered very poor and hence resulting vandalism. In most cases, the heritage stores are small and in poor condition. According to church officials the stores are often overcrowded, heritages put not in systematic and orderly manner. The store keepers, usually monks, have no knowledge of heritage management. They, therefore, heavily rely on traditional knowledge and experience. It is reported that either no shelves or, if they exist, they are not of the required quality to keep the heritages safe. Museums are very few. Some more are under construction but far below the number required to protect the region's heritages. Thus, vandalism from different causes is still a wide spread phenomenon. Rain, fire, termites are some of the threats listed out by the respondents. Case in point is the total damage of "Mahal Zege Giorgis" by fire in 2009 - one of the monasteries in Zege peninsula.

Another major threat to movable heritages is plunder. Ever since the earliest times, many of our movable heritages have been kept inside religious institutions (usually churches) for the obvious reason that these are the scared places where heritages could be safely kept. Nowadays, the trend is changing and once scared institutions are becoming the major targets of looters. All of the interviewees claimed that the state of looting is decreasing in recent times but remains the challenge to the sector in the region. Increasing public awareness and improved security in churches and monasteries are forwarded as reasons. Most of the heritage rich churches and monasteries are secured 24 hours with armed guards. The bureau report indicates that it provided

awareness creation education and training on conservation of heritages for the region's public. The following table indicates the number of people who had participated in the training.

**Table 3.20: Number of participants of training and awareness creation on heritage protection**

Activity /Year	1999	2000	2001
Training	63,781	-----	995
Awareness creation Education	270,195	228,202	366,556
Total	333,976	220,352	367,551

Source: ANRS- BoCTPD

The data from the Region's Police Commission report indicates the state of looting of heritages from churches and monasteries. The total reported cases of plunder decreases from 191 in 2006/07 to 175 in 2007/08. Actually, the decrease is only in looting of holly books and other resources. Decrease of 2 and 19 in looting of holly books and other resources respectively is registered while that of arks and crosses has shown an increase. This implies that the looting is being directed towards arks and crosses which probably are more expensive than others. Even then, the decrease is not to be proud about. Another positive thing is the improvement in the rate of recovery of the plundered heritages. This is true for all of the items included in the table. Overall, the rate recovery increased from 41 percent (79 of 191) in 2006/07 to 56 percent (98 of 175) in 2007/08.

However, it is learned that there are problems in the management of recovered heritages. Usually, recovered heritages remain with police as exhibit for a long period. They will be kept with other items and probably in a way that exposes them for damage and other problems. More over, there are cases where heritages are being transferred to third party. Let alone police, problems are identified with the way the Bureau manages the recovered heritages under its custody. An audit report of the Bureau enumerates a number of problems. Unauthorized dispatch of recovered heritages, heritages not given property identification number, improper handlings of heritages etc are to mention some. In the same report, it is reported that 49

recovered heritages under Bureau's custody have been transferred, transferred with out the necessary procedure, to Amhara Region people Martyrs Memorial Monument Office. The items include an ark, crosses, holly books and others.

**Table 3.21: Crimes on heritages**

Number	Zone	2006/07								2007/08							
		Arks		Crosses		Books		Others		Arks		Crosses		Books		Others	
		Lost	Found	Lost	Found	Lost	Found	lost	Found	Lost	Found	Lost	Found	Lost	Found	Lost	Found
1	NS	10	5	12	7	19	8	-	-	10	8	3	2	6	4	4	1
2	NG	2	2	3	0	3	2	18	7	7	3	2	0	16	9	11	7
3	NW	2	2	-	-	5	1	19	9	4	1	5	3	5	3	9	6
4	SW	-	-	4	2	2	1	14	6	1	1	6	3	-	-	4	0
5	SG	4	3	4	2	4	4	13	3	5	3	8	5	10	5	3	1
6	EG	4	2	4	2	5	3	6	2	7	5	4	3	7	6	6	5
7	WG	2	1	-	-	6	3	1	0	1	0	5	4	2	0	8	2
8	BD	-	-	-	-	1	1	-	-	-	-	-	-	-	-	-	-
9	A	5	1	4	1	4	0	-	-	2	2	3	1	-	-	5	1
10	WH	6	2	3	1	5	1	-	-	2	1	-	-	3	2	2	1
11	O	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Total		35	18	34	15	51	19	71	27	39	24	35	21	49	29	52	24

Source: ANRS Police Commission

NS-North Shewa	SG-South Gondar	NW-North Wollo	WG-West Gojjam	A-Awi
NG- North Gondar	SW-South Wollo	EG- East Gojjam	WH-Wagehimra	O-Oromia

It is good that the rate of recovery of lost heritages by police has improved but it is even better to protect them from being plundered. In some cases, according to church officials, plunder cases may either left unrecognized or recognized after a long time. Inventory in some of the monasteries is taking place every two years time. But the total heritages under the church's possession are not well known. Moreover, the looting techniques are getting complex from time to time. For example, plunderers have gone to the extent of putting prototypes in place of the heritages they loot. There are also cases of involvement of the people under the church umbrella. The respondents also expressed the involvement of owners of souvenir and gift shops.

All these call for more protection activities for regions heritage. Heritage protection activities in the region should be in a more coordinated and organized manner. It should have a broad base, i.e., it should involve all concerned parties. Training and education of the public should continue in a more regular, effective and coherent manner. Inventory of heritages, mechanisms for the classification and safeguarding of their heritage should be put in place. The construction of more church museum should be encouraged by all possible means.

### **3.6.2 Maintenance of Damaged Heritages**

As explained above, tourist attractions of the region are being damaged due to various threats and hence require regular maintenance. From the interview, it is discovered that maintenance for damaged heritages is carried out in the region. Table 22 indicates the maintenance projects in the last three years. The maintenance involves the following procedures. First, the Heritage Protection and Maintenance Major Duty carry out damage assessment of the heritage and on the basis of which develop conservation projects. Searching for source finance is the next step. Finally, the Major Duty implements and supervises the maintenance in collaboration with the concerned body. It is uncovered that some major projects are supervised by the Project Coordination Unit of the MoCT. The major source of finance is the FDRE Heritage Study and Conservation Agency (HSCA). The agency covers the costs of conservation projects from its

budget and aid from different sources. In some cases, though very limited, the surrounding community involves in covering the costs of maintenance projects.

Table 22: Maintenance projects of damaged heritages

Year	Maintenance Projects	Source of Finance
2006/07	<ul style="list-style-type: none"> <li>• “Tana Kirkos”, “Merto Eyesus”, “Dequa Kidanemihret”, “Defecha KidaneMihret”, “Urra Kidanemihret”, “Meskel Eyesus”</li> <li>• Rock Hewn Churches Cover reinforcement and sanitation</li> <li>• Wall painting maintenance for “Rema Medhanialem”, Burie Michael” and “Kidist Hana” in collaboration with experts from France and HSCA.</li> </ul>	HSCA  HSCA
2007/08	<ul style="list-style-type: none"> <li>• “Atse Fasil” Swimming Pool</li> <li>• Dessie Museum</li> </ul>	Norway Embassy  HSCA
2008/09	<ul style="list-style-type: none"> <li>• “Gonji Michael”, “Gonji Tselalo Amanuel”</li> </ul>	HSCA & Community

Source: ANRS - BoCTPD

Various challenges exist in relation to maintenance activities. Shortage of finance, lack of skilled manpower and lack of coordination are the major problems. Though the Bureau has a conservation unit, it is not well staffed. The Heritage Conservation and Tourism Promotion Major Sub Process is reported to be under staffed by 7 employees. Especially, maintenance experts are difficult to find. Moreover, training opportunities for such experts are so far limited to the experience sharing they obtain from HSCA’s experts and others. As indicated in the above

table, attempts are made to use experts from HSCA and even from Countries like France. HSCA is the major source of fund is found in addition to donors. Thought limited, there is involvement of the community. In an attempt to solve the financial problem, the Bureau has developed a draft law for establishing a Trust Fund for the conservation of heritages.

Coordination problem exist between those who finance and those involved in the execution of maintenance projects. There are case of delay and even elapse of project period due to lack of coordination. The Bureau's report (2006/07: 11-13) asserted that "Atse Fasil" Swimming Pool rehabilitation project, which was supervised by HSCA, was delayed basically because HSCA failed to send project progress report to the sponsor timely. The sponsor- the Norwegian Embassy-, then, withheld the periodic release of fund and finally the project period elapsed. Even at the time when the embassy was releasing the payments, as stated in same report, there were delays by HSCA in sending the released fund timely and at required amount. There were further delays in the purchase process of the required materials by the Northern Gondar Finance and Economic division. Fortunately, the project was later reinstated through negotiation held between Norwegian Embassy and FDRE Ministry of Finance and Economic Development.

Reallocation of the maintenance fund to other purpose than for the intended heritage is found to be another problem. Case in point is the West Gojjam Culture and Tourism Division. In 2006/07 budget year, the division has reported to have used Birr 70,000 for some other conservation purposes. The budget was original allocated by HSCA for the maintenance of "Gonji Michael" church. The action of the division had highly discontent of the surrounding community. It took the community two years to raise money and get it maintained. This is a clear indication that there is limitation of supervision with in the tourism activities from the Bureau down to Zone and Woreda structures. The concerned body, Heritage Protection and Maintenance Main Duty in this case, should make sure that the lower administrative bodies are using the fund for the intended purpose. Unless, not only the community develops bad attitude for the activities but it also disappoints the sponsors and seeking funds for future projects turn out to be difficult, if not impossible.

### **3.7 Coordination Among The Stakeholders**

Tourism is a complex, multidimensional, multifaceted activity, which touches many lives and many different economic activities. This diffused nature of tourism with in the economy and with in the government system calls for collaboration among actors. For making the best net benefit (maximizing the benefits and minimizing the costs) out it co-ordination for tourism is at worst desirable and at best crucial. The kind of cooperation needed for tourism can be considered at two levels. On one hand, partnership between respective tourism bodies and non governmental actors in the sector is crucial. On the other hand, co-ordination with in the government system, both horizontally and vertically, is required. On the whole, meaningful collaboration of actors- both with in the government system and government and non government players- is desirable for the development of the sector.

As highlighted above, there are various stack holders in tourism that are involved in it one way or another. Each of the actors has their own role to play. The effective execution of their respective role will definitely contribute positively to the development of the sector. Yet, there are issues of common concern which require common remedy through coordination among the players. Keeping tourists satisfied and there by increasing the tourists' inflow and revenue out of tourism requires the coming together of all stake holders. The stakeholders with the regional government system include the respective tourism bodies, law enforcement bodies, investment authority, educational bodies, information body etc at regional, zonal and woreda level. The EOC, private investors, civil societies, communities around destination and the public at large are some of the non-state actors.

The above actors may cooperate on various issues like promotion of attractions; service improvement; training of manpower; protection of heritages etc. Obviously, the benefit is for all the parties in the sector. For example, service providers and tourism bodies may cooperate towards improving service to visitors. This cooperation is important as tourism is basically a service industry and hence the condition of service largely determines the tourist's satisfaction. One may, however, argue that provision of service is a private sector matter and basically governed by business principles especially competition. This argument may appear sound at least theoretically but suffers practically in our case given the shortage of service providers both in kind and quantity as pronounced in the country's tourism development policy document (MoCT:

8). Even with the existence of required competition, the coordination is needed as complementary to it.

To assess the level of coordination existing among the different actors in the tourism sector in the region, interview was made with different parties. Interviewees include the head of the region's BoCTPD; North Gondar Culture and Tourism Division; Bahir Dar City Culture, Tourism, Labor and Social Affairs Office; Chairmen of the Association of Hotels owners of Bahir Dar city and Gondar town and church officials of the West Gojjam and North Gondar dioceses of the EOC. It is learned that some sort of working relationship exists among these parties.

The bureau cooperates with different federal bodies like MoCT, HSCA etc on various matters. While bureau and the ministry work together on policy matters; exchange information; conservation projects etc, the bureau's relation with HSCA is exclusively limited conservation of different heritages in the region. The HSCA not only provides funds for conservation projects but also some times contributes experts for the same. With regard to conservation projects, the bureau head complained that the federal bodies usually fail to send the allocated project funds on time. He also complained about delays in executing projects supervised by the Project Coordination Unit of the ministry. This is the case when projects are financed through the agreement between the federal bodies and aid agencies. The solution he suggested was the bureau should be given the responsibility to supervise such projects.

As far as the relation between the respective regional tourism bodies is concerned, there exists, as one might expect, direct relation between regional, zonal and woreda level tourism structures. The later lower level structures directly report to the bureau. These respective structures work together in all aspects of tourism responsibilities of the government. The Heritage Conservation and Tourism Promotion Major Process organized at all the three levels for the same. However, it is learned that the zonal and woreda level tourism bodies are relatively weak for various reasons. Budget shortage, lack of man power, capacity limitation, office and furniture scarcity etc are to mention some. There is also problem in timely reporting and exchange of information

As discussed in the preceding paragraphs there exists cooperation between tourism bodies from federal down to woreda level. Nevertheless, collaboration between tourism bodies and other stakeholders with in the regional government system is found to be limited. For example,



alleviating shortage of man power in the sector requires an involvement of educational institutions. There are various areas of cooperation among tourism bodies and law enforcement bodies. These and other necessary collaborations among regional government systems are lacking.

Tourism also demands the collaboration between government and non government actors. As far as the relationship between culture and tourism offices and the respective dioceses of the EOC is concerned, it is learned that they work together basically in two areas- protection and preservation of heritages and organization of religious celebrations. The tourism structures at all levels provide technical support to the different dioceses of the EOC. Occasionally, training is provided to church officials. Case in point is training of trainers provided last year to church representatives from all the dioceses in the region. Damage assessment of heritages, development conservation projects and provide technical staff for the same is also carried out by them. On a more regular basis these bodies cooperate in arranging religious celebrations like “Timket” in Gondar, “Gena” in Lalibela, “Kirstos Semra”, “Gishen Debrekerbie” etc.

Another relation is with service providing organizations like hotels, restaurants, pensions, local guides, boat service provides etc. The bureau in collaboration with zonal and woreda offices carry out control and supervision up on these organizations. In its Business Process Reengineering (BPR), the bureau organized Service Providing Institutions Support, Controlling and Implementing Major Duty under Heritage Conservation and Tourism Promotion Major Process for the same. The bureau’s head explained that they have started to supervise major hotels, restaurants, pensions at least once a year during peak periods- during “Timket” in Gondar and “Gena” in Lalibela. Service, sanitation, number of departments etc are some of the factors being considered during the supervision. So far, supervisions are basically is to provide feedback to the concerned service provider because of lack of regulations for taking measures. However, a draft regulation is prepared recently. Cases of sanitation problem, however, are referred to respective health offices for action.

In addition, the major process provides training and certification to different parties. On occasional basis, the tourism bodies provide training to hotel staff. Training, examination, and certification of local guides, in all major tourist destinations, are carried out by the same major

process. In 2008/09 budget year, for example, training and certification of eight, sixteen, and fifteen additional local guides in Zege, Debarq, and Gondar respectively has been carried out. Sixteen others who studied in private institutions were also certified in Lalibela. In the same budget year, though first in its kind, training for hotel managers and owners in Bahir Dar was provided by an American expert. Birr 200,000 was expended on it and twenty one trainees participated. The cost was covered equally by both the city administration and the business community.

It is possible to conclude, from the above discussion, that the relation existing among the actors in ANRS is not strong. Clearly, it is not a kind of cooperation that can foster the development of the sector at a required stage. First, it is predominantly collaboration with in the tourism bodies from federal to woreda level despite the fact that it suffers from different problems. Second, it is a fragmented cooperation, i.e., separate relationship that the respective tourism structures having with other actors like service providers, the EOC and other players. Finally, the coordination among tourism bodies and other actors in the government system is lacking. This is at odds with the demands of the tourism industry.

The complex nature of tourism require more functional coordination among the tourism the stake holders contrary to what is explained above. Specifically, a more meaningful collaboration among both regional and non state actors is needed. These actors include tourism bodies and other actors with in the government system; service providers; the EOC; law enforcement bodies; investment offices; educational institutions; small and micro enterprises promotion office etc. All these stake holders should come to together, from a common committee, regularly meet and discuss issues together and come up with common solutions. This is what amounts to a meaningful and practical co-ordination that tourism sector needs. The existing problems related to tourism in the region and the challenges to come demand close coordination among the parties. The challenges in the service industry, protection and preservation of heritages, tourists' interaction with locals all require more practical collaboration all the stakeholders if the sector has to develop and make a meaningful contribute to the regional economy.

To sum up, tourism by its nature involves different actors. The success of the sector and the effective contribution of it to the economy is, therefore, partly dependent on the level of

coordination existing among the stakeholders. The industry is often cited as an attractive agent of development or redevelopment, generating employment and foreign exchange in a destination. However, the degree to which tourism has the potential to contribute to the broader socio-economic development of the destination is conditional, among other things, on the level of synchronization existing between the different actors of the sector.

## **Chapter Four**

### **Conclusions and Recommendations**

#### **4.1 Conclusions**

Amhara national regional state is rich in cultural, historical and natural attractions that can attract visitors from all around the world. The attractions include monuments, ancient churches and monasteries, religious festivals, rivers and lakes, hot springs, water falls, flora and fauna. These resources provide the region a huge potential tourism. However, this huge potential remains relatively untapped due to various reasons to the extent that it contributes its best to the regional economy. Tourist flow and receipt has been growing in the region. The increase in tourists flow can be attributed to the socio-economic development and democratic processes that have taken place in the country over the past decade or so. Nevertheless, the most likely reason for tourists for visiting the country is still its rich cultural and historical heritage. Tourists are drawn to the region more by the attraction than other factors like service etc.

The findings of the research are presented below under achievements, opportunities and challenges

- **Achievements**

One of the responsibilities of government as a party in charge of leading tourism industry at the forefront is providing regulatory frame work for the same. It has at its disposal the regulatory power to shape the industry in way that the positive impacts of it are maximized and the undesirable ones are minimized at the same time. So far necessary legislations and regulations for the industry have been lacking. However, the bureau is trying its best to come up with such regulations and legislations. It has developed draft regulations for certifying, classifying and supervising hotels; licensing and controlling tour operators and tour guides and establishment Trust Fund for the conservation of heritages. It is also learned that others regulations and standards are being prepared.

Another achievement is the training provided to different bodies in an effort to shortage of manpower that marked the sector. Trainings for hotel workers, tour guides, church officials and

the general public have been provided on different themes. A related development is the organization service providers in to association. Hotel associations, tour guide associations, boat service providers association are organized in the region.

Still good development is the efforts made to improve availability of information. A couple of measures are taken with regard to providing information to inbound tourists. One is the development of the web site of the bureau and preparation of regional guide book which can be accessed from the web site is another.

Organization of “know your country” clubs is another important step taken to develop domestic tourism in the region. Other regions are also expected to do the same as stipulated in the countries tourism development policy. Obviously, this step will take domestic tourism one step ahead if the clubs organized became active and make regular travels to different places. The concerned tourism bodies are expected to take steps to strengthen them.

- **Opportunities**

A number of opportunities are identified in the research, the major being availability of market in the future. It is found that the demand component of tourism will continue to grow in the time to come creating an opportunity for countries around the world. International organizations like UNWTO and WTTC forecast that tourism industry is going to grow in future and it is forecasted to grow in favor of developing countries. Africa’s share of the international tourism is projected to grow 5% even above the world average. Capitalizing this opportunity requires developing the properly response by the country in general and the region in particular. First and foremost, effective promotion and image building is needed. Then, measures should be taken to strike a balance between the demand and the supply components of the industry.

Responding to the opportunity that lies ahead requires, among other things, encouraging investment flow in to the industry. It appears that the future is expected to be bright in this regard as increasing number of investors are showing interest in pouring their money in hotels, transportation. The tourism body in collaboration with other concerned bodies should take concert steps to this end. There are a number of measures at the government’s disposal from providing concrete market opportunity information to offering different inducements.

As tourism is basically a service industry, manpower play vital role in tourism development. In the past the sector has been characterized by shortage of manpower both in number and in kind. This is expected to improve as a number of institutions are providing training at middle and high level in tourism related fields. The TVET colleges in the region and a couple of private institution provide are providing middle level trainings like Food and Beverage , Front Office Operations, Hotel management, Tour Guiding , Travel Operation while Gondar University is offering a high level training. There are also other similar institutions outside of the region.

- **Challenges**

One big challenge of the industry is negative image of the country coupled with limitation in promotion. Considerable number of the tourists had negative impression of the country before coming to it and some were even indecisive of traveling to the country at times. But this bad perception all change after their visit. It is true that socio-economic development and democratic processes have been taking place in the country over the past decade or so. The problem what ever positive changes happening to the country have not been communicated to potential tourist around the world. Mostly, the country is perceived by its past than what the country stands currently.

On top of it, there are limitations in promotion. In addition to third party promotion by Ethiopian Air Lines and Embassies, different promotional techniques have been traditionally employed by Tourism Market Development Directorate of MoCT. Guide books, brochures, participation in travel fairs, sponsoring travel journalists are some of them. In general, systematic approach to promotional activities is lacking. No market research is being carried out to determine such things as which places to target; what method to use; what should be the content of the message; how to brand the country etc. Besides, the effectiveness of the promotional methods adopted have not been evaluated.

The diffused nature of tourism with in the economy and with in the government system demands coordination among stack holders. One aspect of it is collaboration among actors both horizontally and vertically. Cooperation of state actors with non-state actors is the other aspect. There exists some kind of collaboration among the actors in ANRS but it is not kind of cooperation that can foster the development of the sector at a required level. There exists better cooperation with in the tourism bodies from federal to woreda level though it suffers from

certain problems while horizontal coordination among tourism bodies and other actors in the government is system is lacking. State to non-state actors cooperation is fragmented, i.e., separate relationship that the respective tourism structures having with other actors like service providers, the EOC and other players.

Thought improving over time, service sector still remains one of the challenges of the industry in the region. Difficulty in getting lodging, low standard accommodations, comfort and sanitation problems and health hazards are some of the setbacks of lodging sub-sector. The quandary relating to food and beverage include limitation in choice, health hazards etc. The tourists' assessment of the overall service is not encouraging. Most of them are not happy about it. They also felt that they service are overpriced compared to the offerings.

Tourism in the region is mainly confined to major tourist destination areas. To maximize the revenue from tourism new attractions have to be discovered, developed and promoted well-even. Domestic tourism has been sidelined in favor of international tourism. It is limited to religious celebrations and family visits. Recently, however, efforts are being made to develop through organization of "know your country" clubs

Another challenge of the industry is conservation of heritages. These resources are being damaged by man made and natural attractions. Plundering is still a problem though showing decrease. The maintenance activities are crippled by such problems as lack of finance, expertise and problem of coordination

## 4.2 Recommendations

It is found out that tourism market opportunity exists for the future for the country in general and the region in particular. Capitalizing on this opportunity require an effective response in the supply side of the industry. The researcher recommends the following

- To be competitive in the international market and reap the forecasted market opportunity, effective promotion and image building about the country and its tourist attractions is required. Successive market research to determine the target market, promotional methods etc should be carried out and the effectiveness of the methods regularly be assessed.
- Improving the service sectors is another important measure that should be taken. Encouraging investor to invest in the industry is an important step. This not only increases the stock of tourism related business but also induce increased competition that leads to service improvement. Different mechanisms like incentives can be used for the same. The manpower development for the sector should further be strengthened
- Effective and functional collaboration among the stakeholders should be created and made to direct the industry. This could include participants with in the government system both horizontally and vertically and non- state actors like private investors, religious institutions etc. All of these parties should have a certain common organ, cooperate in all aspects and work together to develop the sector.
- Conservation of the cultural, historical and natural resources should be given due attention. Education and awareness creation activities on protection and preservation of heritages must be strengthened. Educational institutions should be encouraged to produce skill manpower for the conservation and preservation of heritages. Broadening the sources of finance and encouraging the participation of the NGOs, Aid agencies, the general public is necessary.
- Domestic tourism should be developed for a number of reasons. It not only creates demand for service providing institutions but also promote understanding and tolerance among different people. The organization and strengthening of “know your country” clubs should continue in schools, work places and religious institutions. Tour operators should also be encouraged to involve in domestic tourism.



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## Appendix A: Data collection instruments

### *Questionnaire for Tourists*

This questionnaire is designed to undertake a research entitled “Achievements, Opportunities and Challenges of tourism industry in Amhara National Regional State” as a partial fulfillment of the requirement for Master of Public Administration and Development Management in Addis Ababa University. Amhara National Regional State is one of the nine regions in Ethiopia and is home for such tourist attractions as the Rock Hewn Churches, the Fasiledus Castle, the Semien Mountains National Park, the Lake Tana Monasteries, Blue Nile Falls etc. I kindly request you to respond to all of the questions. Any information you will be providing will purely used for an academic purpose and will be kept completely confidentially.

Thank you for cooperation.

#### Part I- Preliminary questions (put a tick mark)

1. Age  <20  21-30  31-40  41- 50  51- 60  61- 70  >70
2. Sex  Male  Female
3. Nationality \_\_\_\_\_
4. Occupation \_\_\_\_\_

#### Part II- Research questions

5. Length of visit of the country ( in days) \_\_\_\_\_
6. Length of Visit of the region (in days) \_\_\_\_\_
7. How did you come to Ethiopia?  
 Independently  Using to operators service Other, specify \_\_\_\_\_
8. From which source did you first heard about Ethiopia and its tourist attractions?  
 Tv ads  Internet  Trade fairs  Ethiopians living abroad  
 Friends and relatives who visited Ethiopia before me  
Other, please specify \_\_\_\_\_
9. What was your image of Ethiopia before coming to the country?  
 Extremely negative  Negative  Positive  Extremely Positive
10. Have you been in decisive of coming to the country and to the region particularly due to the negative image you had?

Yes       No

11. If you had a negative image, do you believe that the image you had represents the realities in the country and the region?

Yes       No

12. What are the key variables you consider in your travel decisions? (please rank them by using numbers 1, 2, 3... in the box in front of the variable of your choice)

Attractions       Quality of service       \_\_\_\_\_  
 Security and safety       Cost of touring       \_\_\_\_\_

13. Did you encounter problem of getting transport to come to the region?

Yes       No

14. How about getting transportation to move from place to place with in the region?

Yes       No

15. What mode of transport did you use to come to Amhara region?

Air       Land

16. What type of land transport did you use to move from one destination to another with in the region?

Rented cars       Public transport       Other

17. Did you often face problems related to public transport like delays, over pricing and other inconveniencies in the region?

Yes       No

18. Are Guide books on Ethiopia adequately available at an affordable price?

Yes       No

19. Do you think that tourist information easily and adequately available in the region?

Yes       No

20. Have you visited any of the information centers in the region?

Yes       No

21. Are tourist information centers adequately available and easily accessible?

Yes       No

22. Did you use the service of local tourists in the region?       Yes       No

23. Are they qualified, integrative and provide good service?       Yes       No

24. Do you believe that you had enough choices of food and drink in the menu of hotels; restaurants etc from which you can pick what you prefer?

Yes  No

25. Have you suffered from health problems due to food related causes?

Yes  No

26. Did you get the necessary medical treatment and cured?  Yes  No

27. How often did you face the above four problems? agree

Once  Twice  Three times  Four times  Many times

28. Did you face problems in getting accommodation?  Yes  No

29. Have the accommodations been clean and comfortable?  Yes  No

30. Have you suffered from health problem relating to accommodations?  Yes  No

31. Have your complaints over poor service been properly and promptly addressed by the concerned body?  Yes  No

32. Do you feel that you have been overcharged or overpriced for services and products in the region?  Yes  No

33. How do you see the overall level of services in the region?

Extremely poor  Poor  Average  Good  Excellent

34. Was your interaction with the local people good?  Yes  No

35. Have you been stolen, cheated, intimidated or attacked in the region?  Yes  No

36. Are you satisfied with your visit of the region and the country in general?

Yes  No

37. Do you consider coming back to the country and the region in the future?

Yes  No

38. Would you encourage others back home to visit the country and the region?

Yes  No

### *Interview schedule*

#### Interview for government officials

1. Would you describe the status of tourism sector in the region? How do you evaluate the industries performance in the region?
2. Does your organization have working relations with other organizations and institutions in the sector? Could you list out these institutions? What do you think is the importance of such relation? How do you evaluate the relation?
3. What are the activities being carried out with regard to protection and preservation of the region's heritages both by your organization and others? What are the problems in this regard? What do you think should be done?
4. Would you reflect on the status of service in the region? What do you believe should be done in the future?
5. What are the activities being carried out in promoting the regions tourist attractions for both international and domestic tourists? What are the methods being used? Do you believe the methods being used are effective?
6. Do you believe that tourist information is adequately available in the region? Are there adequate information centers? Do tourists easily access them?

#### Interview for church officials

1. What do you think is the role of the Ethiopian Orthodox Church in tourism in the region? Does the church have an institutional arrangement for the same? What are the activities the church is carrying out?
2. Does the church have any working relation with the tourism bodies? What are the areas you cooperate? How do you evaluate the cooperation?
3. Would you describe the condition of tourist resources under the church custody? How is the protection and preservation of these resources? What are the activities being carried out in this regard? How is the plunder and vandalism of the heritages?

## Appendix B: Ratio of regional inbound flow to national

The regional inbound tourist flow data was in local calendar but the national statistics was in European calendar. To comparison possible, the regional data is converted in to that of the European calendar. A simple assumption of even monthly flow is made and the four months flow of last previous year and eight months flow of the succeeding year are summed up to give an estimated flow in European calendar. For example, the four months flow of 2002/03 flow plus 8 months flow of 2003/04 will give the flow of 2003. The following table indicates this calculation.

Year	Inbound tourists	Conversion	Year	Inbound tourists
2002/03	36,011			
2003/04	36,200	$4/12(36,011) + 8/12(36,200) = 36236$	2003	36236
2004/05	44,502	$4/12(36,200) + 8/12(44,502) = 41,734$	2004	41,734
2005/06	45,428	$4/12(44,502) + 8/12(45,428) = 43,119$	2005	43,119
2006/07	53,149	$4/12(45,428) + 8/12(53,149) = 50,574$	2006	50,574
2007/08	60,932	$4/12(53,149) + 8/12(60,932) = 58,337$	2007	58,337
2008/09	71,779	$4/12(60,932) + 8/12(71,779) = 68,163$	2008	68,163

Source: ANRS- BoCTPD

After reconciling the above difference, the regional inflow is compared to the national flow and the following result is obtained.

Year	Inbound tourist inflow		Region's share of the national flow
	Regional	National	
2003	36,236	179,910	20.1%
2004	41,734	184,078	22.7%
2005	43,119	227,398	19.0%
2006	50,574	330,026	15.3%
2007	58,337	357,849	16.3%
2008	68,163	383,399	17.7%

Source: MoCT

## Appendix C: Computation of average length of visit of tourists

*Length of visit in the country (in days)*

Length of visit	Frequency	Length of visit	Frequency	Length of visit	Frequency
5	////	12	///	21	///
6	///	14	////	25	//
8	////	15	///	30	////
9	//	16	///	60	///
10	//// /	17	//	63	//
11	////	20	////	92	/

To arrange the above data in to frequency distribution number of class (k) and class width should be computed.

$$K \text{ such that } 2^k \geq n \longrightarrow 2^k \geq 60 \longrightarrow k = 5.5 \approx 6$$

$$\text{Class width} = (\text{highest value} - \text{lowest value}) / k \longrightarrow (92 - 5) / 6 = 14.5 \approx 15$$

Class	Frequency (F)	Mid point(M)	F * M
5 – 19	40	12	480
20 – 34	14	27	378
35 – 49	0	42	0
50 – 64	5	57	285
65 – 79	0	72	0
80 – 94	1	87	87

Therefore, the average length of stay is computed using

$$\text{Average} = \frac{\sum FM}{\sum F} = \frac{1230}{60} = 20.5$$



*Length of visit in the region (in days)*

Length of visit	Frequency	Length of visit	Frequency	Length of visit	Frequency
1	//// /	4	//// //	14	////
1 ½	///	5	//// /	30	///
2	//// ////	10	////	48	//
3	//// ////	12	////	90	/

To arrange the above data in to frequency distribution number of class (k) and class width should be computed.

$$K \text{ such that } 2^k \geq n \longrightarrow 2^k \geq 60 \longrightarrow k = 6$$

$$\text{Class width} = (\text{highest value} - \text{lowest value}) / k \longrightarrow (90 - 1) / 6 = 14.8 \approx 15$$

Class	Frequency (F)	Mid point(M)	F * M
1 – 15	54	8	432
16 – 30	3	23	69
31 – 45	0	38	0
46 – 70	2	53	106
76 – 90	0	68	0
80 – 94	1	83	83
Sum	60		690

Therefore, the average length of stay in the region is computed using:-

$$\text{Average} = \frac{\sum FM}{\sum F} = \frac{690}{60} = 11.5$$

## Appendix D: Hotel, pensions and restaurant around major tourist destinations in the region

Hotels and pension in major tourist destinations.

No	Name of the business	Town the business is found	Food supplied		Number and types of rooms					Shower		Toilet		No of personnel	Remark
			Foreign	Local	single	Double	Twin	King size	Suit	Individual	Common	Individual	Common		
1	Papyrus Hotel	BahirDar	√	√	48	30	10	10	2	10	-	10	-	132	
2	Summer Land Hotel	“	√	√	18	10	12	-	-	40	6	40	4	41	
3	Kuriftu Resort & Tana Lodge	“	√	√	12	4	8	6	8	38	6	38	6	32	
4	Abay Minich Lodge	“	√	√	14	9	5	-	-	28	3	28	3	15	
5	Dib Anbesa	“	√	√	11	18	23	-	2	60	-	60	6	69	
6	Ghion Hotel	“	√	√	10	-	20	-	-	30	3	30	4	102	
7	Tana Hotel	“	√	√	-	-	56	-	42	64	-	64	-	58	
8	Blue Nile Hotel	“	√	√	15	10	6	-	-	31	2	31	2	27	
9	Ethiostar Hotel	“	√	√	14	10	6			20	-	20	2	19	
10	Abay lodge	“	√	√	8	4	4	2	-	18	2	18	2	21	
11	Enkutatash No1	“	√	√	12	-	-	-	-	-	-	-	-	17	
12	Bahir Dar Hotel	“	√	√	23	-	-	-	-	5	3	5	3	22	
13	Enkutatsh No2	“	√	√	9	-	-	-	-	9	-	9	-	12	
14	Gojjam Hotel	“	X	√	15	-	-	-	-	10	2	10	2	7	
15	East Africa Hotel	“	X	√	13	-	-	-	-	-	2	-	3	11	
16	Aksume Hotel	“	X	√	10	-	-	-	-	-	2	-	1	12	
17	Ha Hu Hotel	“	X	√	8	-	-	-	-	-	2	-	1	12	

18	Tselao Hotel	“	X	√	6	-	-	-	-	-	1	-	1	9	
19	Girum Gaint Hotel	“	X	√	16	-	-	-	-	3	2	3	2	12	
20	Guna Terara Hotel	“	X	√	12	-	-	-	-	-	2	-	1	11	
21	Azua Hotel	“	X	√	6	-	-	-	-	-	1	-	1	12	
22	Ethiopia Hotel	“	X	√	10	-	-	-	-	-	2	-	2	7	
23	Tadesse Pension	“	-	-	14	8	-	-	-	16	10	16	10	16	
24	Tsehay Pension	“	-	-	20	6	-	-	-	14	12	14	12	14	
25	Hadas Penision	“	-	-	12	-	-	-	-	-	4		4	13	
26	Fikreselam Pension	“	-	-	10	-	-	-	-	-	2		1	11	
27	Mebrate Penision	“	-	-	6	-	-	-	-	-	1		1	8	
28	Abyssinia Pension	“	-	-	8	-	-	-	-	-	1		1	7	
29	Enat Pension	“	-	-	6	-	-	-	-	-	1		1	6	
30	Genet Terara hotel	Gondar	√	√	28	3	-	-	-	7	4	6	4	34	
31	Ambaras Hotel	“	√	√	11	6			-	6	4	6	4	15	
32	Hibret Hotel	“	√	√	18	5	7		-	21	10	21	10	49	
33	Ethiopia Hotel	“	√	√	10		12		-	-	6	-	4	38	
34	Circle Hotel	“	√	√	12		12		-	24	-	24	-	46	
35	Embassy Hotel	“	√	√	13	5			-	18	-	18	-	30	
36	Red Fox Hotel	“	√	√	13		2		-	15	-	15	2	26	
37	Quara Hotel	“	√	√	10		16		-	6	8	6	8	61	
38	Goha Hotel	“	√	√	10	6	8			14	4	14	4	30	
39	Fogera Hotel	“	X	√	8		12			12	2	12	2	30	
40	Andnet Hotel	“	√	√	21					-	3	-	6	16	
41	Kapera Walia hotel	“	√	√	12	2	2			16	-	16	-	17	
42	Lamerger Hotel	“	X	√	12		6	2		10	8	10	8	26	
43	Fasil Ghimb	“	X	√	8	4				-	4	-	4	12	
44	Wobeze Hotel	“	X	√	10	-				-	2	-	2	8	
45	Roman Hotel	“	X	√	7	-				4	3	4	3	9	

46	Belenze Pension	“	-	-	3		11			10	4	10	2	7	
47	Limalimo Pension	“	-	-	18					2	2	2	2	6	
48	Humera Pension	“	-	-	23	6				10	4	10	4	10	
49	Misrake Pension	“	-	-	14					8	2	6	2	6	
50	Roha Pension	“	-	-	4		3			2	1	2	1	4	
51	Lale Hotel	Lalibela	√	√	10	55				65	3	65	4	42	
52	Seven olive	“	√	√	2		37	4		25	1	25	2	40	
53	Roha Hotel	“	√	√			57	6	1	61	2	59	4	42	
54	Eyerusalem guest house	“	√	√	6		14	5		25	1	25	1	17	
55	Alef Paradise	“	√	√	5		5			6	1	6	1	6	
56	Ashton Hotel	“	√	√	5		7	3		10	1	10	2	6	
57	Blue Lale	“	√	X	10		6			5	2	5	2	5	
58	Tikul Hotel	“	√	X	21		3			12	1	12	1	10	
59	Feven House	“	√	√	3		6			5	1	5	1	5	
60	Lalibela Pension	“			3		10			13	2	13	2	12	
61	Helen Pension	“			5		3			2	1	2	1	5	
62	Red Fox Hotel	Debark			6		6				2		2	16	
63	Abyssinia Hotel	“			14		1			2	4	2	4	4	
64	Semin Park Hotel	“			5		8			1	2	1	2	14	
65	Met Goge Hotel	“			8	2	6			4	3	4	3	12	

Major Restaurants in Bahir Dar and Gondar

Name of restaurant	Highland	Amanual	Bahil	Eshet
Yordanos	Ethio-espangnol	Tinkish	Abay Fuafuate	Habesha Kitfo
Tana Tafach	Betiel	Yitenbie Kitfo	Rase	Tewodros
Ankore	Flem	Addis	Laku	Abajale
Sebastopol	Bereket	Infinity	Central	Time Paradise
Tinsae	Shola	Awotash	Mugera	
Mars	Dima	Mini- fogera	Angar	

## Appendix E: Major Tourist Attractions in ANRS

### *Historical, Religious and Cultural Attractions*

No	Attractions	Locations	Period of Foundation
1	Monuments Rock-Hewn Churches Medieval Gondar Castles Cave churches Thatched Roofs	Lalibela and surrounding Gondar Around Lalibela Elsewhere in the region	Late 12 <sup>th</sup> & early 13 <sup>th</sup> C Late 12 <sup>th</sup> & early 13 <sup>th</sup> C 14 <sup>th</sup> and 15 <sup>th</sup> centuries
2	Island monasteries	Lake Tana	Medieval Period
3	Paintings Murals Locons Manuscripts	At different churches and monasteries	Ancient and modern
4	Parchments Scrolls Books	At different churches and monasteries	Ancient, medieval and Modern
5	Crosses, Crowns and other Artifacts	At different churches and Monasteries	Medieval periods
6	Early Judaism Tan kirkos Mertole Mariyam Tedbe Mariym	Lake Tana East Gojjam South Wollo	Before Christianity Before Christianity Before Christianity
7	Special religious festivals Epiphany Christ Mass Gishen Debrekerbe	Gondar Lalibela North Wollo	
8	Battle fields And Arms Meqdela Sebastopol Other Traditional arms Wuchale Metema	South Wollo South Wollo Elsewhere in the region South Wollo North Gondar	1868 Before 1868
9	Bridges Garno Alata Sebara Didiy	Enfranz TisAbay Mota	Medieval

	Angerb	Angerb	
10	Unique settlements Shonkey Awramba	Around kemise South Gondar	1100
11	Mosques Goze Tiru Sina Shonkey Bati	Shewa Robit Kemisie Kemisie Bati	20 <sup>th</sup> Century
12	Other Cultural practices Hair style dressing jewelry Body Accessory Coffee Ceremony Marriage Ceremony Traditional songs and dances Various musical instruments	Every where in the region	
13	Open Air markets Bati Senbtie Bahir dar Chagni Aliyu Amba	Bati Senbetie Bahir Dar Chagni North Shoa	People with different cultural values are seen in these market places

*Natural attractions*

No	Attractions	Locations
1	Water falls Nile falls Fang falls Donor falls Jinbar falls	Tis Abay town Tilil town Chagni town SMNP
2	Lakes Lake Tana Lake Zengena Lake Tirba Lake Dutsi Lake Lago	Bahir Dar town Injibara town Gimja Bet town Kasa town Haik town

3	Hot springs Wanzaye Aweytu Harbu Aregawi Jewha	Around Woreta town Around Senbate town Harbu town Shoa Robit town North Shoa
4	Parks Semien Mountain National park (SMNP)	Debark
5	Mountain Peaks Ras Dashen Guna Abune Yosef Chokie	North Gondar South Gondar North Wollo East Gojjam
6	Scene views Mountain missives Hills Green fields	Elsewhere in the region Elsewhere in the region Elsewhere in the region
7	Endemic Wild Life (mammals) Walia Ibex Simen Fox Gelada Baboon Minilk's Bushbuck	In SMNP In SMNP ( North Wollo & North Shoa too) In SMNP (North Wollo & North Shoa too) In SMNP and North shoa
8	Endemic Wild life (plants) Jaint Lobelia Abyssinian Rose	In SMNP In SMNP
9	Endemic wild (Birds) Ankober Seren Golden Backed wood beaker White winged ciff chat Black Headed oride Abyssinian catbird	North Shoa In SMNP In SMNP In SMNP In SMNP
10	Natural Caves Denula Yohannes	Gimja Bet area



# DECLARATION

I, the undersigned, declare that this thesis is my original work and has not been presented for a degree in any other university and that all sources of material used for this thesis have been duly acknowledged

## **Declared by:**

**Name:** MELESE SITOTAW

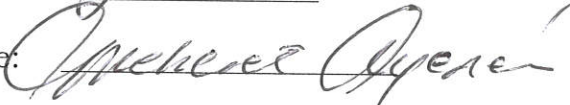
Date: 13 July 2010

Signature: 

## **Confirmed by Advisor:**

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Place and date of Submission: Department Public Administration and  
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