



**ADDIS ABABA UNIVERSITY
COLLEGE OF DEVELOPMENT STUDIES
CENTER FOR ENVIRONMENT AND DEVELOPMENT STUDIES**

**Trends, Challenges and Opportunities of Domestic Tourism Development in
Ethiopia: Stakeholders' Perspective**

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Declaration

I, the under signed, declare that this study entitled, *Trends, Challenges and Opportunities of Domestic Tourism Development: Stakeholders's Perspective* is my own work. All information in this document has been obtained and presented in accordance with academic rules and ethical conduct. This study has not been submitted for award of any Degree/Masters/PhD program in this or any other institution and, I have fully cited, acknowledged and referenced all materials and results that are not original to this work.

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Abstract

The main objective of this study was to explore trends, challenges and opportunities of domestic tourism development in Ethiopia based on stakeholders' perspective. The study employed mixed method design where both quantitative and qualitative data were collected from purposely selected respondents. Quantitative data was collected from 159 participants drawn from key tourism stakeholders including governmental bodies, tourism and hospitality service providing entities, industry associations, academicians and experts based on purposive and convenient sampling techniques. Qualitative data was collected from 10 key informants, two each from officials, senior experts, academicians, tour operators and national tour guides based on purposive sampling technique. Quantitative data was analyzed using descriptive statistics and exploratory factor analysis, while qualitative data was analysed through content and discourse analysis. The finding reveals that the trend of domestic tourism in the country is not developed and also stricted to some travel purposes particularly to religion. Limited tour and travel culture of citizens, government strategic directions and priority problems and capacity related problems including research gaps on the sector and absence of appropriate institutional structure have been identified as major challenges facing domestic tourism development in Ethiopia. On the other hand, availability of abundant tourism resources and potentials were identified as most enabling conditions to develop the sector.

Key Words: Domestic Tourism, Trends, Challenges, Opportunities, Stakeholders and Ethiopia

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Acronyms

CTTI – Catering and Tourism Training Institute

ESTDP - Ethiopian Sustainable Tourism Development Project

ETC – Ethiopian Tourism Commission

FDRE MoCT – Federal Democratic Republic of Ethiopia Ministry of Culture and Tourism

OECD – Organization for Economic Cooperation and Development

SD – Standard Deviation

TALC – Tourist Area Life Cycle

UNWTO – United Nations World Tourism Organization

CHAPTER ONE: INTRODUCTION

1.1. Background of the Study

Tourism is considered as a typical vehicle for economic development of both developed and developing countries in terms of job creation, foreign exchange earning and economic diversification (Tadesse & Getaneh, 2018; Robinson & Jonker, 2016; OECD, 2016; UNWTO, 2010 and Mazimhaka, 2006). It is also conceived as one of the fastest and continuous growing sectors in the world. According to UNWTO (2010) it has unique role in job opportunities and sustainable development of residents and helps to transform them in to green economies. As Mazimhaka (2006) in this regards described tourism as a continuously growing industry worldwide, has often demonstrated its role as a vital tool in the advancement of economies through direct domestic and foreign exchange earnings and through the employment and investment opportunities it generates. Furthermore, tourism in many countries has emerged to become an important economic sector, often replacing traditional industries such as agriculture (McLennan et al, 2012). As result of this, many countries throughout the world are striving to enhance their tourism development and actively promote themselves as tourism destinations (Ritchie & Crouch, 2000 as cited by McLennan et al in 2012).

Historically, domestic tourism is the first form of tourism that was practiced and still it continues to account for the most part of tourism activities (Pierret, 2011). Differently said, domestic tourism is one of the two legs of the total tourism industry that plays countless roles in economic, socio-cultural and environmental terms (Ephrem, 2012). Domestic tourism as one fragment of tourism sector has a strong connection with economical, socio-cultural, political and environmental issues. As a typical contribution, developing domestic tourism is widely acknowledged for inducing a redistribution of national income, from richer, typically metropolitan areas, to poorer, usually rural and isolated areas (Neto, 2003). Furthermore, the role of domestic tourism in fostering brotherhood and building national identity has started to be recognized by governments (Ephrem, 2012). According to Mazimhaka (2007) and Morupisi & Mokgalo (2017) domestic tourism is still one of unobserved themes in African tourism scholarship since the planning and promotion of tourism in most African countries is inclined

towards international tourism. As existing evidences clearly show, developing countries always decorate international tourism for its capacity for generating their foreign exchange rate and ignored their domestic tourism sector as one area of development and field of study (UNWTO Commission for East Asia and Pacific, 2012; Ephrem, 2012). Because of this backward looking, no attention is paid to domestic tourism, especially if nothing is threatening the international tourism market and temporary concern is only expressed when numbers in international tourism decline such as during low seasons, and when international tourists cannot come due to threats such as terrorism, economic declines, pandemic disease outbreaks, local conflicts, and political differences with source countries that affect citizens free movements (Manono and Rotich, 2013).

In fact, domestic tourism has huge potential of covering gaps that may be resulted from seasonality and sensitivity nature of tourism. According to Manono & Rotich (2013), international tourists cannot always support the tourism industry of the nations, especially in years of economic, political and social chaos. This mean that domestic tourism is a giant facilitator for economic growth of tourism as well as its sustainability especially in times of global uncertainties (Domestic Tourism Growth Strategy of South Africa, 2012 – 2020). For example, as indicated in the Tourism Satellite Account of South Africa (2010), the percentage share of domestic tourism for South Africa's GDP contribution in 2009 and 2010 was 54.8% and 58.8% respectively. Furthermore, Ngari (2017) has strengthened this sector's typical role for developing countries in terms of employment and domestic value chains.

As international tourism and domestic tourism are two sides of the same coin, it seems better to develop them parallel and it is believed that for tourism industry to become successful, these two segments should complement each other. But this reality is not existed and domestic tourism in many developing countries is nearly non-existent, with local residents mainly visiting friends and relatives (Mariki et al., 2011). When we think about international tourism development, it seems difficult to neglect the issue of domestic tourism, since it paves the way for international tourism development. As clearly stated at Domestic Tourism Growth Strategy of South Africa (2004-2007) domestic tourism market has untapped value and potential for countries' growth and development.

In the Ethiopian context, tourism sector is growing from a low base by only having 1 percent share of Africa's tourism market and it continues to underperform despite its potential (Binayew, 2016; Ethiopia's tourism sector strategic paths to competitiveness and job creation, 2012). According to MoCT & ESTDP (2015), the country is the owner of varied attraction sites and it is unique since it is the land of smiling and hospitable people, the land of 12 world heritage sites, the land of 13 months of sunshine, the land of the Ark of the Covenant, the land of coffee Arabica, the land of endemism, the land of cradle of humanity, the land of strong history and independence, the land of ancient civilizations, the land of mosaic of nations and nationalities, the land of long distance runners, the land of water tower of Africa, the land of the roof of Africa, the land of affordable destinations and easy life and generally the land of origins.

On the other hand, according to Ethiopian tourism development policy (2009), tourism is believed to make a marvelous contribution serving as a source of foreign exchange, promoting micro and small-scale enterprises, creating employment opportunities, and ensuring sustainable development opportunities in the country. Nevertheless, tourism development in the country is at its infancy stage and the case becomes very serious as far as the country's domestic tourism development is concerned. Literatures listed above highlighted that domestic tourism is critical and supportive for nations' economy development; especially in times of sensitivity and seasonality.

While Ethiopia has enormous potential in terms of varied attraction sites, its current level of domestic tourism development is not satisfactory and competitive and even it is among one of neglected segments of tourism industry although it is a base for the country's economy and for international tourism development (Ephrem, 2012). Thus, this research, therefore, explores national trends in domestic tourism development and challenges facing and opportunities available for it in the Ethiopia context.

1.2. Statement of the Problem

Domestic tourism has been noted to promote national pride among citizens, bridge the seasonality gap, increase employment and investment opportunities as well as increase benefits to small and medium enterprises (Morupisi & Mokgalo, 2017; Ephrem, 2012; Mazimhaka, 2007). Despite its potential, however, domestic tourism is largely ignored and under-researched aspects of tourism economies in developing countries (UNWTO Commission for East Asia and Pacific 2012; Ephrem, 2012; Ghimire, 1997 as cited by Skanavis and Sakellari, 2011). There is even a critical gap in domestic tourism statistics and measurement when compared with international tourism and it is difficult to get appropriate statistics of domestic tourism in terms of different parameters (UNWTO Commission for East Asia and Pacific, 2012; Ephrem, 2012). Furthermore, as Ephrem (2012) and Meron (2018) clearly mentioned, rare attention is given to this sector by governments, stakeholders and researchers alike. Most of the time tourism research is restricted to international tourism and most studies only analyze international tourism either because of unavailability of data on domestic tourism or because of undervaluing of this sector (Ephrem, 2012; Cortes-Jimenez, 2008).

Like in many other developing countries, studies on domestic tourism are rare in Ethiopia. Few of the previous studies on the area focused predominantly on domestic tourism's role as a vehicle for tolerance and peace building (Yechale, 2013); challenges and opportunities of domestic tourism development (Ephrem , 2012); challenges of religious tourism development (Gedecho , 2014); practices and predicaments of tourism clubs or know your country clubs for domestic tourism development (Meron, 2018) and challenges and opportunities for community based ecotourism development (Gebeyaw, 2011). Such studies were conducted in specific areas and there is no comprehensive study that has looked into the trends, challenges and opportunities of domestic tourism development at national level. This study, therefore, attempts to fill these gaps by exploring national trends in domestic tourism development and analyzing challenges facing and opportunities available for it.

1.3. Objective of the Study

1.3.1. General Objective

The main objective of this study is to explore the trends, challenges and opportunities of domestic tourism development in Ethiopia.

1.3.2. Specific Objectives

The specific objectives of the research are:

- To explore trends of domestic tourism development in Ethiopia
- To identify challenges of domestic tourism development in Ethiopia
- To identify existing opportunities of domestic tourism development in Ethiopia

1.4. Research Questions

This study tries to address the following research questions. These are:

1. How does domestic tourism development in Ethiopia look like?
2. What are the challenges facing domestic tourism development in Ethiopia?
3. What opportunities are existed for domestic tourism development in Ethiopia?

1.5. Significance of the Study

This study has a potential to contribute to domestic tourism development in Ethiopia. By identifying existing challenges and problems that hinder domestic tourism development in Ethiopia, it serves as an asset for domestic tourism development strategy of the country. Thus, can be used as guideline for policy makers and practitioners, it also helps to upgrade and improve tour and travel culture of the citizens. Finally, it initiates other researchers to carry out further studies in this sector.

1.6. The Scope of the Study

The scope of this study is limited to stakeholders' perspective on trends, challenges and opportunities of domestic tourism development in Ethiopia.

1.7. Organization of the Study

This study is ordered into five chapters. The first chapter is introduction, which includes background of the study, statement of the problem, objective of the study, basic research questions, significance of the study, scope of the study and organizational structure of the study.

The second chapter contains the literature review with its sub topics of conceptual definitions, theoretical review and empirical review (trends of domestic tourism at global, Africa & Ethiopia level, challenges and opportunities of domestic tourism).

The third chapter is regarding research design and methodology with its sub topics of research design, target population, sample, sampling techniques and procedures, data types & sources, data collection instruments, data analysis techniques, research time plan and budget plan.

The fourth chapter shows the result or finding of the study and discussions of findings.

The last chapter, chapter five, presents the conclusion and recommendation part of the study.

The references and appendixes are also listed at the last page of the study.

CHAPTER TWO: LITERATURE REVIEW

This chapter presents concepts and definitions, theoretical review and empirical review of the study.

2.1 Conceptual Definitions

2.1.1 Tourism

The definition of tourism varies from source to source and from one scholar to another and there is no common consensus towards the definition of tourism since each scholar and institution tries to define the concept in different way. So, it is very difficult to get a single and universally accepted definition for tourism and this is even supported by different authors. The term tourism is one of the most controversial concepts which have no distinct and universally accepted definition (Aregawi, 2016). Due to this reason, the term tourism has defined by different scholars in different times and some of the definitions given by scholars and organizations are reviewed as follows.

Tourism is defined as “the temporary movement to destination outside the normal home and workplace, the activities undertaken during the stay, and the facilities created to cater for the needs of tourists” (Matheieson & Wall, 1982). On the other side according to the definition that was given by UNWTO (1993), tourism is “the activities of persons travelling to and staying in places outside their usual living and working environment for not more than one consecutive year for leisure, business and other tourism related purposes.”

As usual tourism is always composed of two elements namely the journey to destination and the stay (including activities) at the destination. The journey and stay takes place outside the usual environment or normal place of residence. The movement to destinations is temporary and short term in character and the intention is to return back. Destinations are visited for purposes other than taking up permanent residence or employment in the places visited. Even the concept of tourism is not the same with the concept of travel.

According to UNWTO, the concept of tourism is different from the concept of travel and at least basic criteria must be fulfilled and in order for tourism to take place, there must be a

displacement: an individual has to travel, using any type of means of transportation including travelling on foot (poorer societies, pilgrims, hikers etc.). But all travel is not considered as tourism. Three criteria are used simultaneously in order to characterize a trip as belonging to tourism. These are displacement, purpose of visit and duration of time.

2.1.2 Domestic Tourism

Like tourism it is very difficult to get a single definition for domestic tourism and different authors have defined the term at different times. As World Tourism Organization (1995) stated domestic tourism indicates the movement of residents of a given country irrespective of their nationality, travelling as visitors to a place within the country other than their usual area of residence for a period of not more than a year for a purpose other than the exercise of a remunerated activity in the place visited. The other definition given by Gakuru (1993 as cited by Ngula, 2010) defined domestic tourist as “a person who travels from his place of residence and goes to another destination within the country and spends {her} time in enjoying activity or activities which bring him to the destination while paying.

On the other study conducted by Ndlovu, Nyakunu & Heat (2010), domestic tourists comprise of locals travelling within their own country for the purpose of visiting friends and relatives or traveling for leisure. On the other hand, there are authors that have defined domestic tourism as travelling of residents of a country visiting destinations in their own country (Goeldner & Ritchie, 2012). By its unique nature there is no necessity of passport, visa and other travel related documents facilitation in this form of tourism. As differently said by Becken (2009 as cited by Kabote, Mamimine and Muranda, 2013) domestic tourism incorporates all trips over 40 kilometres outside one’s usual environment which can be day trips or overnight trips for any travel purpose. But this definition contradicts with definition given by UNWTO. According to World Tourism Organization (UNWTO) domestic tourism is defined as follows.

“Domestic tourism is the activity of persons traveling to and staying in places outside their usual environment but within the country of residence for not more than one year for leisure, business and other purposes.”

The other definition given by Demunter & Dimitrakopoulou (2011) stated that domestic tourism indicates inhabitants of a given country travelling to and staying in places only within that country and to be outside their usual environment.

Generally speaking, the concept of domestic tourism is one of tourism disciplines that have no consent in literatures and there is no common consensus as far as the definition of domestic tourism is concerned. Due to this reason each scholar and organization tried to define the term “domestic tourism” in different way.

2.2. Theoretical Review of Domestic Tourism

There are different types of theories that have been developed over the years in relation to tourism development. In the following some of these theories that have a direct and indirect linkage with research topic are discussed.

2.2.1 Butler’s Theory

Butler model (1980) is one of the most quoted theories in the touristic literature (Cooper, 1994 as cited by LY Mouhamadou, 2018). Richard W. Butler’s theory was published in 1980 as a model of tourist destinations evolution known as Tourist Area Life Cycle (TALC) and this model postulates that the tourist sites go through six (6) stages in their evolutions known as exploration, involvement, development, consolidation, stagnation, decline or rejuvenation (LY Mouhamadou, 2018). This model was based on the business concept of the product life cycle and this product life cycle is a theory in which sales of the new product grow slowly and then experience a period of rapid growth before stabilizing and then declining.

When applied to tourist destinations, Butler’s model suggests that resorts and other tourist destinations develop and change over time and that there are certain stages namely exploration, involvement, development and consolidation. During these stages the destination has an increasing number of tourists. After the consolidation stage, the destination could stagnate and it could decline or rejuvenate. Generally, these stages of Butler’s model can be easily illustrated through using the following diagram as follows.

Table 1: Butler's Tourist Area Life Cycle

Stages of Butler's Theory	Characteristics
Exploration Stage	In this stage few people visit the areas with no public facilities, adventurous tourist; visitors are more attracted by natural physical features; close interaction with local people, word-of-mouth promotion; minimal effect on social, cultural and physical environments; local facilities are used.
Involvement Stage	Increased tourist numbers; still under local control; some advertising; start of tourist market and season; interaction stay high; some changes in social life and pressure on infrastructure; local entrepreneurs start to offer basic specialized service and facilities for tourists.
Development Stage	Development of additional tourist facilities and increased promotional efforts and there is greater control of the tourist business by outsiders and foreign-owned facilities increased from time to time and leads to loss of local control. In this stage number of tourists increase rapidly to equal or exceed local population and leads to rising antagonism by the later towards the former. This stage is also characterized by promotion of artificial attraction, enhanced accessibility, use of migrant labour and a rapid landscape change.
Consolidation Stage	In this stage tourism has become a major part of the local economy, but growth rate declines and a well-delineated business district has taken shape and some of the older deteriorating facilities are perceived as second rate. Local efforts are made to extend the tourist season and some opposition may happen to tourism due to over-crowded and high-density of tourism destination and product deterioration and abandonment of facilities.
Stagnation Stage	In this stage peak numbers of tourists and capacity levels are reached and the resort has a well – established image, but it is no longer trending. The accommodation stock is gradually eroded and property turnover rates are high and reliance on repeats and conventions, surplus hotel capacity and changes in ownership, focus on package tourist; social, environmental and economic problems may arise.
Decline Stage	Tourist market is lost; vacationers decline; reliance on weekenders and day visitors; conversions of many facilities; local resentment towards visitors
Rejuvenation Stage	In this stage changed attractions; a new tourist market is found.

Figure 1: Theoretical Life Cycle of Tourist Destination

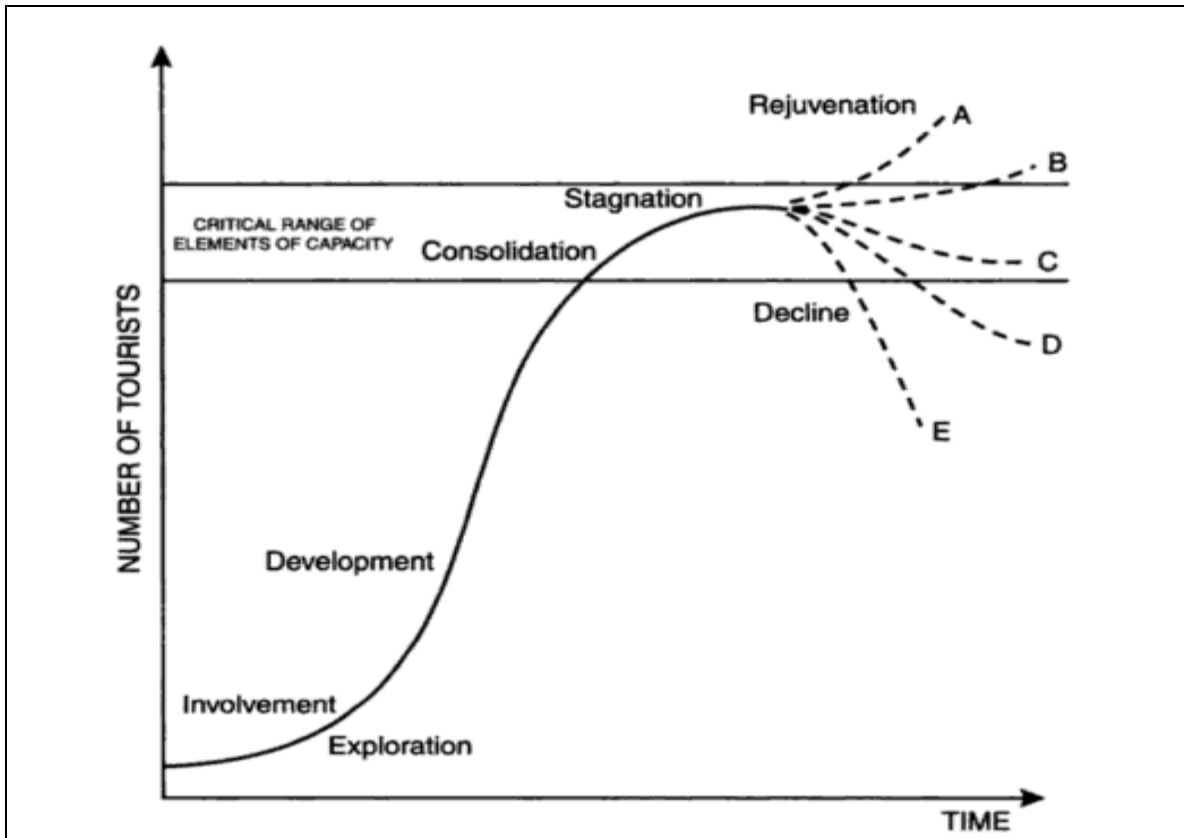


Figure 1: The theoretical life cycle of a destination (adapted from LY Mouhamadou, 2018)

In 1998, Butler recognized his model and he showed that despite some criticisms, after almost 20 years, there was much support for his original model. He recommended that the following key points confirmed the validity of his original theory.

- The key concept is dynamism (destinations change over time).
- There is a common process of development of tourist destinations.
- There are limits to growth (if the demand for visit is more than the capacity of the destination, the number of visitors will decrease and subsequently decline).
- There are triggers or factors that bring about change in a destination.
- Management is an important factor (good management is needed to avoid the failures suggested by the model).
- Long term view is very important (there is a need to look ahead for 50 years, not for 5 years, to avoid the failures suggested by the model).

- Spatial component (there is a possibility that tourists will go else where as the destination declines)
- Universal application (the model applies to all destinations).

2.2.2 Doxey’s Theory

Established by Doxey in 1975, irritation index or Doxey’s irritation index is one aspect of tourism theory that is based on the understanding of local resident’s attitude change towards tourists and tourism development in different stages of destination’s life cycle. Its different phases are primarily the consequence of tourism development in terms of its varying social, economic, and environmental impacts on the destination. This model finally assumes that the resulting circumstances with negative sociocultural impacts can lead to irritation in the local community.

Doxey’s irritation model has four stages of destination life cycle namely: euphoria, apathy, irritation and antagonism and these phases explain the deteriorating responses of the local residents to tourism development.

During the first stage, the number of tourists is small and the local community is interested to welcome tourists. In the second phase (apathy), the number of tourist increases and the relationship between tourists and residents becomes formalized. The third phase “irritation” is the phase when residents become concerned about tourism due to significant growth of arrivals and increasing competition for resources. In the last stage of antagonism tourists become responsible for everything bad that has happened in the host community. Doxey’s irritation index is highlighted as follows.

Table 2: Doxey’s Irritation Index

1) Euphoria	▪ Visitors are welcome and there is a little planning
2) Apathy	▪ Visitors are taken for granted and contact becomes more formal
3) Annoyance	▪ Saturation is approached and the local people have misgivings and planners attempt to control via increasing infrastructure rather than limited growth
4) Antagonism	▪ Open expression of irritation and planning is remedial, yet promotion is increased to offset the deteriorating reputation of the resort

2.2.3 Stakeholders Theory

Stakeholders theory was first manifested by Dr. F. Edward Freeman, a professor at the University of Virginia and in his book entitled as: strategic management: a stakeholder approach which was published in 1984 and reprinted in 2010, he set the new agenda for what is known as stakeholder theory (Freeman, 2010 and Freeman, 1984). This theory has emerged as a new story to comprehend and cure three interconnected business problems including the problem of understanding how value is created and operated, the problem of connecting ethics and capitalism and the problem of helping leaders/ managers regarding how to think about their leadership/ management skills (Freeman, Harrison, Wicks, Paramar and DeColle, 2010). Stakeholders theory more importantly advocates that if it is possible to adopt as a unit of analysis, the relationships between a given business and the groups and individuals who can affect or affected by it then it is possible to have a better chance to deal effectively with these three problems (Freeman et al, 2010).

From a stakeholder perspective, any type of business can be understood as a set of relationships among groups that have a stake in the activities that make up a business and this theory like other theories is a critical tool to better describe and act in a complex world (Freeman et al, 2010). This theory is actually an idea that tells about how a given business really works and also suggests that for any business to be successful, it has to create value for its customers, suppliers, employees, communities, shareholders, banks and other stakeholders (Freeman, 1984).

The stakeholder theory concept has achieved widespread popularity among academics, media and others and now a day it is very popular because people and so on stakeholders are worried about the sustainability of overall economic system (Fontaine, Haarman and Schmid, 2006). The stakeholder approach or theory has been applied in different sectors including rural development, public management and tourism development (Simmons, 1994; Lit vin, 2005 and Aas et al, 2005 as cited by Sinh, Nga, Hailinh and Tuan, 2016).

2.2.3.1 Aspects of Stakeholder Theory

According to Donaldson and Preston (1995) there are three aspects of stakeholder theory namely: descriptive, instrumental and normative stakeholder theories. Descriptive outlook of stakeholder theory is one aspects of stakeholder theory that clarifies the past, present and future standings of affairs between organizations and their respective stakeholders (Donaldson and

Preston, 1995). Descriptive stakeholder theory is concerned with how managers and stakeholders actually behave and how they view their actions and roles (Fontaine et al., 2006). The descriptive outlook explores the corporate characteristics that derive the behavior of a given organization as it narrates and tends to assess management perceptions of the organization's obligation to its stakeholders (Donaldson and Preston, 1995).

As identified by Donaldson and Preston (1995) a stakeholder theory is considered as instrumental if it creates a basis for inspecting the associates between the practice of stakeholder management and the attainment of objectives. The instrumental stakeholder theory deals with how managers should act if they want to flourish and work for their own interests (Fontaine et al., 2006).

The normative approach stresses stakeholder management theory as somewhat doctrinaire tool for management while the instrumental approach focusses on the outcomes of stakeholder management and how it impacts the organization's financial and social performance (Verbeke et al., 2013 as cited by Nicolaidis, 2015). The normative aspect is considered to be the most important stakeholder theory (Freeman, 1998; Donaldson and Preston, 1995). This theory contains theories of how managers or stakeholders should act and view the organization's purpose based on ethical principles (Fontaine et al., 2006).

2.2.3.2 Lists of Stakeholders in Tourism Development

The term stakeholder indicates any group or individual who can affect or is affected by the achievement of the organizations' objectives (Freeman, 1984). According to Clarkson (1995 as cited by Nicolaidis, 2015) stakeholders are all entities which become either willingly or unwillingly exposed to any activity of the organization which poses a risk to them in some or other way. Any group or individual able to influence or be affected by any decision in the process to achieve the goals of an activity and that is truly interested in it must be considered as part of such activity and thus must be respected (Queiroz, 2009).

Tourism is an industry that involves multiple stakeholders where the responsibility for destination competitiveness is shared by suppliers, government agencies, tourism market intermediaries, NGOs, the general public and tourists (Azzopardi, 2011 as cited by Fathimath, 2015). The complex nature of the tourism industry and the multiple stakeholders that are

involved in producing and satisfying tourism experiences and products complicate the situation for destinations in achieving and sustaining their competitiveness (Fathimath, 2015). As Fathimath (2015) added more the success of any tourism destination competitiveness relies on the efforts of all stakeholders that contribute to creating the total tourism experience. If it is desirable that tourism enterprises must seek to maximize stakeholders' interest and engagement (Nicolaidis, 2015).

The first step to stakeholder participation is to identify lists of those stakeholders (Byrd, 2007 as cited by Fathimath, 2015). The lists of stakeholders in tourism development includes national, regional and local governments, tourism establishments and tourism enterprises including their associations, institutions engaged in financing tourism projects, tourism employees and professionals, tourism consultants, tourism education and training centers, travelers, host communities, other juridical and natural persons having stakes in tourism development including non – governmental organizations specializing in tourism and directly involved in tourism projects and the supply of tourism services (UNWTO Survey on the Implementation of the Global Code of Ethics for Tourism, 2005).

According to Friedman and Miles (2006) the main groups of stakeholders are customers, employees, local communities, suppliers, distributors and shareholders. In addition, other groups and individuals including the media, the general public, business partners, academicians, competitors, NGOs, activists, governmental bodies, regulators and policy makers are considered to be stakeholders (Friedman and Miles, 2006).

According to Jamal and Getz (1985 as cited by Queiroz, 2009) tourism cooperation is a process of making jointly decisions among autonomous key actors who constitute inter - organizational structure in the receiving community to solve the problems related to the design and management from a sustainable scope. On the other hand, as Timur and Getz (2008 as cited by Fathimath,2015) stated stakeholders from public and private sectors and the local communities play critical roles in the development and implementation of sustainable tourism development.

Although the involvement of all stakeholders does not need to be equal in the decision making process, it is important that the interests of all parties must be identified and understood (Donaldson and Preston, 1995). According to Saftic et al (2011 as cited by Fathimath, 2015)

tourism stakeholders can also be classified in to primary stakeholders and secondary stakeholders. Primary stakeholders include governments, destination marketing organizations, hotels and similar establishments, tourism operators, convention centers, transportation companies, residents, airports, airlines and tourists. Secondary stakeholders include chamber of commerce, community groups, gas stations, incentive planners, media, retail operators and universities.

2.3. Empirical Review of Domestic Tourism Development

2.3.1 Trends of Domestic Tourism Development

2.3.1.1 Global Trends of Domestic Tourism Development

The level of domestic tourism is relatively matured in developed countries typically in western part of the world including USA and Europe (Ephrem, 2012; Demunter & Dimitrakopoulou, 2011; Ngula, 2010). Most importantly the volume of domestic tourism at international level is huge even much more than international tourism and it currently accounts for approximately 80 % of all tourism receipts (Ephrem, 2012 and Neto, 2003). Not only in terms of volume, domestic tourism has a lion's share in some countries as far as its expenditure pattern is concerned and even in some countries its value is far greater than that of incoming international tourism (Ephrem, 2012). For instance, domestic tourism in the United States of America accounted for 99% of the total tourism sector in 2013 (Batinoluho, 2017). This growth of domestic tourism in USA was supported by various state level campaigns launched in 2013 and 2014 such as "Pure Michigan" and "Utah Mighty 5". The other developed country that is well experienced by domestic tourism is Australia and in this country this sector contributed 94 % of the tourism industry in 2013 (Batinoluho, 2017).

Domestic tourism is well experienced in Europe and Europeans spend 77% of their holiday trips in their own country (Demunter & Dimitrakopoulou, 2011). For example, when the typical example of United Kingdom is assessed, this sector is matured and the bulk of its tourism is domestic, which has been generating the movement of 67 billion Pound around the country's economy (Ngula, 2010). Visitor spend of England in 2016 was reached 92 billion Pound accounting for over 80% of the total visitor spend and domestic tourism in this country is the key

driver by supporting different types of job opportunities in this country. Domestic tourism is also matured in other developed countries including Japan, China and related ones.

The level of domestic tourism development is at its infancy stage in developing world compared to developed ones. Eventhough it has unique role to lead to fantastic growth it is largely ignored and under researched segment of tourism economy in developing countries (Ephrem, 2012; Ghimire, 1997 as cited by Skanavis & Sakellari, 2011). This shortage of domestic tourism research and ignorance is caused by more emphasis given by national governments, practitioners and policy makers to foreign exchange earnings that comes from international tourist arrivals (Morupisi & Mokgalo, 2017; Ephrem, 2012; Mazimhaka, 2006; Scheyvens, 2002 as cited by Skanavis & Sakellari, 2011). Furthermore, domestic tourism statistics and information is extremely scarce in this corner of the world (Ephrem, 2012). Due to this and related reasons the status of domestic tourism development in developing world is not satisfactory compared to developed world.

Inspite of this reality in recent years, many countries have paid their attention to develop and promote domestic tourism in response to declining international arrivals and with a typical focus on this segment of tourism countries have to diversify their tourism products to attract a wider target audience for domestic tourism market (Ephrem, 2012). Developing countries like South Africa, Thailand, Kenya, Malaysia, Nigeria, India and China have improved their domestic tourism development (Manyara, 2017, Ephrem, 2012; Rogerson & Lisa, 2005 as cited by Mazimhaka, 2006). For instance, China has appropriately used this sector as a typical tool to eradicate poverty and generate diversified job opportunities and to cover seasonality gaps of tourism (CTTI, 2011).

More importantly domestic tourism is relatively rising in Asian developing countries including China, India, Thailand and Malaysia (Manyara, 2017; Mazimhaka, 2006) and some facts of this sector in Thailand and Malaysia can be illustrated as follows:

Table 3: Some Examples of International & Domestic Tourist Arrivals

No.	Country	Total international tourist arrivals	Total domestic tourist arrivals	Remarks
1.	Thailand	Over 29.8 Million	Over 25 Million	Thailand tourist statistics(2007)
2.	Malaysia	Over 83 Million	Over 176.9 Million	Malaysia Tourist Statistics (2015)

Adapted from Manyara (2017) and modified by the researcher

2.3.1.2 Trends of Domestic Tourism Development in Africa

The governments and tourism bodies in Africa and others mostly focused on developing and promoting international tourism instead of domestic tourism due to their high spending patterns (Makbaola, 2015). According to Africa Travel Association & World Bank Competitiveness Report (2011) Africa is gifted with abundant natural and cultural resources and represents unexploited endowment in travel and tourism and tourism in this continent has huge potential to generate significant employment, growth and poverty reduction. Actually domestic and regional tourism should be corner stone of tourism development in Africa (Manyara, 2017).

Opposite to its massive amount of tourism resources, the status of tourism development in general and domestic tourism development in particular in this continent is at its infancy stage compared to the rest corner of the world. According to Mazimhaka (2006) the ignorance and existing situation of tourism development and participation in Africa is explained as follows.

African countries, mainly in sub-Saharan Africa, often over-reliant on one or two sectors for economic development, have recognised the potential of the tourism industry to diversify local economies and contribute to poverty alleviation, economic regeneration and stability, affording many Africans the opportunity to participate in and benefit from tourism. The participation of local populations in Africa's tourism industries, however, is often limited to employment opportunities. Travel by local tourists is often overlooked by members of the tourism industry, and is often considered a luxury by many in the local population. The role of domestic tourism and its importance for the creation of a sustainable tourism industry has been widely acknowledged, but limited writings on the subject exist and few tourism policies include domestic tourism, neglecting its potential.

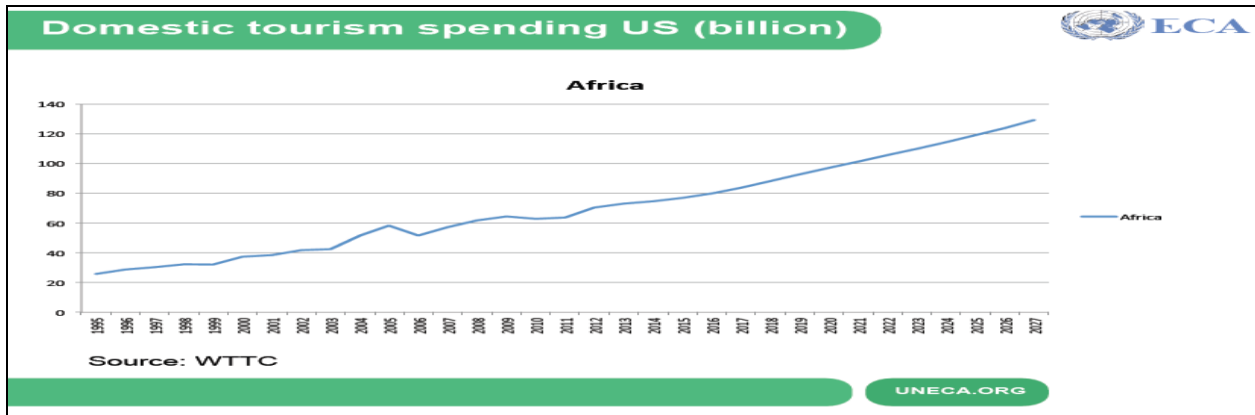
Actually the continent has numerous advantages to develop its tourism sector since it has a strong affinity for tourism and rich natural and cultural resources as well as price competitiveness. In spite of these fertile grounds, there are lots of obstacles that stand behind to develop the sector in this continent including the issues of safety and security, health and hygiene, infrastructure and access to sites and skilled man power and improvements in these critical areas may greatly enhance Africa's Ability to harvest the vast potential benefits of its tourism sector (Africa Travel Association & World Bank Competitiveness Report, 2011).

Not only in terms of international tourism, there is a great potential for domestic tourism development in Africa. According to Manyara (2017) & Ephrem (2012) encouraging the citizens of the continent to take part in domestic and regional tourism can be part of developing sustainable tourism industry in Africa. But according to several studies the current status of domestic tourism development is very much problematic in Africa. Traditionally developing countries including African countries heavily rely on international tourist arrivals at the expense of promoting their domestic tourism (Ephrem, 2012 and Ndlovu et al, 2010). This is resulted due to high interest of Africans for hard currencies. Ephrem (2012) more importantly stated that the notion of tour and travel culture typically for leisure purposes is still considered to be an extravagance in many African countries including the members of middle class who are more likely to have the time and resources to travel.

Generally, as previous literatures clearly show that domestic development in Africa in terms of volume and expenditure is very low compared with the rest of the world even though there is a progress from time to time typically in some countries including South Africa, Kenya and Nigeria. For instance, South Africa has been considered as one of the success stories of domestic tourism in Africa and this sector provides more jobs than international tourism in this country (Omolo, 2008). As Omolo (2008) additionally strengthened this, according to the first annual domestic tourism report in 2005, there were a total of 36.2 million trips made by domestic tourists in South Africa and these tourists totally spent 21.2 billion rand.

But generally at African level as the following consecutive graphs clearly show that the nature of domestic tourism development typically pattern of spending is low compared to other parts of the world even if it is increasing from time to time.

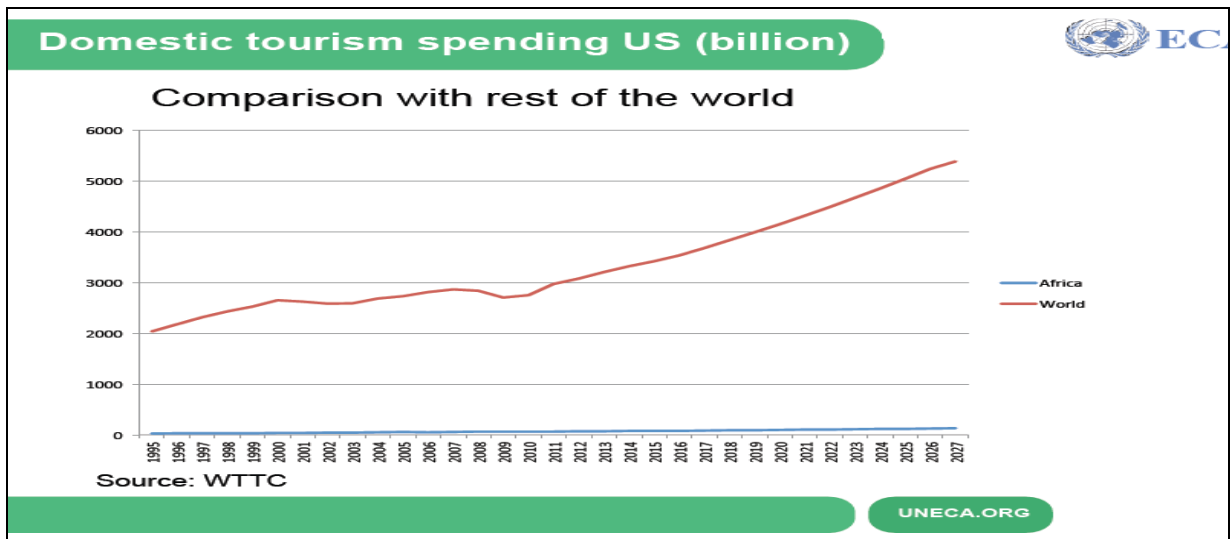
Figure 2: Domestic Tourist Spending of Africa



Adapted from Manyara (2017)

This figure shows that domestic tourism spending patterns in Africa and as it is clearly seen it is increasing gradually from time to time.

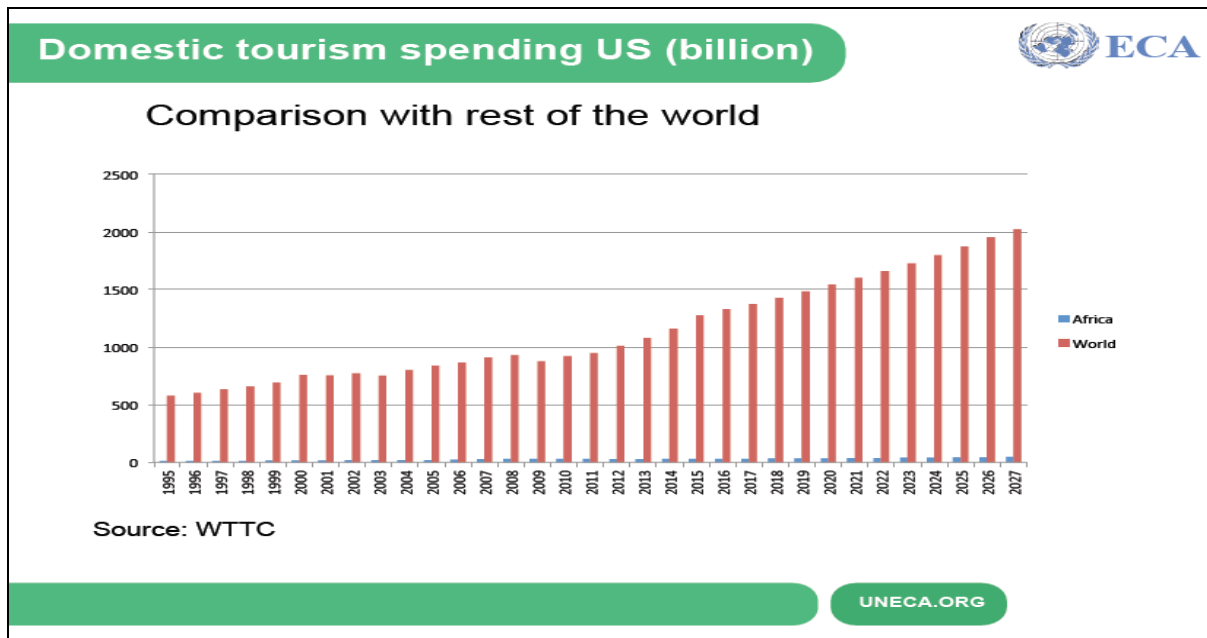
Figure 3: Domestic Tourist Spending of Africa compared to the spending pattern of the World



Adapted from Manyara (2017)

As this graph clearly shows domestic tourism spending in Africa is invisible when it is compared with the rest of the world.

Figure 4: Domestic Tourist Spending of Africa compared with the rest of the World



Adapted from Manyara (2017)

This figure clearly shows as how much domestic tourism spending in Africa is invisible when it is compared with the rest of the world.

2.3.1.3 Trends of Domestic Tourism Development in Ethiopia

2.3.1.3.1 Historical Background of Domestic Tourism Development in Ethiopia

Not only domestic tourism, tourism in general was not considered as a pillar of socio-economic foundation in Ethiopia (Ayalew, 2010). That is why the country is unsuccessful as far as its tourism development and management is concerned. As previous literatures clearly stated this sector was considered as one aspect of economic sector in the country very recently compared with other countries of the world (Ephrem, 2012). Due to the absence of supportive socio – economic structures, tourism was delayed to be considered as one of the economic sectors of development and the sector get the first attention by imperial government in the second half of the twentieth century and this was very chronic period in Ethiopia’s tourism history since it paved the way for institutional structure of tourism establishment in this country (Ayalew, 2010).

Ethiopia as one of the least developed countries in the world has paid great attentions to the economic impacts of international tourism starting from 1950 onwards and hence every thing was oriented towards the extraction of more foreign exchange earnings and because of this no more attention was paid to domestic tourism sector (Ayalew, 2010).

As Ephrem (2012) in this regards mentioned, major activities undertaken during imperial period and the existing situation of domestic tourism related activities in Ethiopia can be explained as follows:

“Tourism during the imperial period was preoccupied with structural adjustments and hence the office was merged with different statutory government organs such as Ministry of Information which affected its operation. Even though the modern organized tourism industry was institutionalized and tourism was recognized as one of the economic sectors in the country, domestic tourism was not given attention during the Imperial Period”

Because of this reason, domestic tourism in imperial period was not as such targeted segment of tourism and promotional campaigns were largely concentrated on attracting international tourists. Therefore, until 1974 it was not the focus area of the government and was practiced and circulated only around the royal families, higher officials, rich aristocrats and foreigners or expatriates (Ayalew, 2010).

However, after 1974, stronger emphasis was given to this sector with the reduced rail and airfares as well as hotel tariffs and special promotional activities in Amharic and other local languages were undertaken and these occasions encouraged Ethiopians to travel, to know and enjoy within their country (Ayalew, 2010). Associated with this, the importance of promoting domestic tourism including giving due attention to create mutual understanding and friendship among peoples among Ethiopians was recognized in Ethiopia after revolution of 1974 and one of the fascinating activities that deserve attention in Derg regime was the development of domestic tourism (Ayalew, 2010). In order to achieve this, a new department has been set up under Ethiopian Tourism Commission (ETC) and domestic tourism neglected in imperial regime was hoped to create desirable understanding among the inhabitants of different regions and then to create unity, pride and loyalty to their common country (Ayalew, 2010; CTTI, 1976).

The main reason why the Derge regime gave due emphasis to domestic tourism was its ideological difference with western world that closed the door for former international tourists originated from western parts of the world (CTTI, 1976).

Domestic tourism department was established under ETC and has done lots of promotional works such as motivating and educating Ethiopians at mass gatherings and meetings, showing the documentary films and slides, actively participated in expos and exhibitions and also tried to identify and register tourist sites etc. (Ayalew, 2010; CTTI, 1976). As the result of these publicities, a number of governmental and mass organizations and associations were mobilizing their resources and established “Heggerhen Ewok” (Know Your Country Clubs) and to accommodate the low income domestic tourists, the government paid great attention in planning and establishment of facilities throughout the country and this was also a very hopeful trend and holds a promising prospect for the promotion of tourism movements at homeland (Ayalew, 2010; CTTI, 1976). Then after, the domestic tourism development was affected by civil wars particularly in Northern part of Ethiopia.

In spite of its drawbacks, the volume (number) and value (expenditure) of domestic tourism is increasing from time to time especially religious based domestic tourism is growing from time to time (Gedecho, 2014 and Ephrem, 2012). Ethiopia as a country where religion is dominant, pilgrimage voyages to sacred places is under taken and is essential feature in many Ethiopian societies (Ephrem, 2012).

Not only in religious tourism Ethiopians have long term trends in business and sport tourism. But there is a critical gap in statistics and measurement of domestic tourism at national, regional and local levels. Of course some regions including Amhara and Gambella have tried to measure their respective volume and value of domestic tourism. But at national level it was impossible to get compiled data regarding volume and value of domestic tourism in the country except statistics of international tourist arrivals and receipts.

Table 4: Statistics of International Tourist Arrivals and Receipts to Ethiopia

Year	International Tourist Arrivals and Tourism Receipts				
	Total number of arrivals	Tourism receipts			
		Amount of receipt in USD	% of Growth in USD	Amount of receipt in ETB	% of Growth in ETB
2011	523, 438	411, 638, 987	23.5	6, 145, 770, 076	23.5
2012	596, 341	333, 236, 539	-19.05	5, 924, 945, 662	-19.05
2013	681, 249	2, 550, 592, 512	665.4	51, 011, 850, 240	665.4
2014	770, 428	2, 884, 482, 432	13.09	57, 689, 648, 640	13.9
2015	863, 742	3, 233, 850, 048	12.1	64, 677, 000, 960	12.1
2016	870,597	3, 259, 515, 168	0.7936	-	-
2017	933,344	3, 494 , 439, 936	0.07207	-	-

Own compilation (Source from MOCT Tourism Statistics Bulletin No.11 & 12)

From this table we can clearly understand that statistics and measurement of domestic tourism is ignored by Ministry of Culture and Tourism and it only compiled international tourist arrivals and respective revenue. Eventhough there are some initiations by some regional culture and tourism bureaus to compile statistics of domestic tourism it was very difficult to get compiled statistics and measurement of domestic tourism at national level.

Due to this reason the researcher was enforced to use the sample of Amhara Regional State Culture and Tourism Bureau tourist flow and income statistics to show trends of domestic tourism measurement and statistics although it does not show the figure of the country.

Table 5: Amhara National Regional State Tourist Flow & Income (1994 – 2010)*Amhara national regional state Tourist flow & Income 1994-2010*

<i>Year E.C</i>	<i>International & Domestic tourist flow</i>		<i>Income From International and domestic tourist (Birr)</i>		<i>Total income from domestic and international tourists</i>
	<i>International Tourist Flow</i>	<i>Domestic Tourist Flow</i>	<i>From International tourist (Birr)</i>	<i>From domestic tourist (Birr)</i>	
1994	22,589	33,792	-	-	19,221,442
1995	29,108	36,011	-	-	24,950,373
1996	36,200	94,011	-	-	32,156,107
1997	44,502	119,044	-	-	40,156,107
1998	45,428	51,089	-	-	42,174,169
1999	55,066	69,557	-	-	52,691,722
2000	60,932	100,268	-	-	58,097,467
2001	71,779	126,261	-	-	179,438,395
2002	86,772	708,399	138,572,085.88	54,417,469.12	192,989,555
2003	128,690	1,326,431	195,430,664	119,592,642	315,023,306
2004	132,184	2,023,219	197,046,183	236,426,185	433,472,368
2005	158,015	6,442,390	437,671,008	231,234,943	933,606,898
2006	204,062	6,653,640	481,828,265	654,797,210	1,279,420,000
2007	223,949	8,256,364	587,132,802	1,101,679,873	1,688,812,675
2008	235,253	8,889,080	562,167,229	1,339,158,827	1,901,326,056
2009	105,791	9,518,940	506,400,511	1,084,449,344	1,590,849,855
2010	209,642	12,629,895	983,135,863	1,394,228,275	2,377,364,138

Source: Adapted from Amhara Regional Culture and Tourism Bureau

2.3.1.3.2. Policies, strategies and Legal frameworks of Domestic Tourism Development in Ethiopia

The first tourism development policy in Ethiopia was issued in 2009 and before this period there was no organized tourism document that helps to guide the country's tourism sector in broad based manner (Ephrem, 2012; Ethiopian Tourism Development Policy, 2009). This policy serves as a guideline for all tourism related actives in Ethiopia.

Tourism development policy as one and major national tourism document has its own role for country's domestic tourism development. First of all, it helps to recognize the economic, social and political benefits of domestic tourism and it also encourages the formation and growth of tourism associations and clubs known as "know your country" clubs at place of residence, workplace, education and worship (Ephrem, 2012). In addition to this, Ethiopian tourism development policy helps to urge the general public in order to strengthen the tour and travel habits of Ethiopians for the sake of knowing and appreciating the attractions of their country through touring individually or in groups (Ephrem, 2012).

Further more Ethiopian tourism development policy is important since it highlights how to develop tourism industry in broad based manner including financing the tourism sector, the nature and direction of product development and maintenance, infrastructural development, tourism taxation and different types of regulatory practices that must be under taken (Ethiopian Tourism Development Policy, 2009).

But simply preparing national tourism development policy is not enough since it is a need to have its own strategy or implementation plan. It was very difficult to fully implement the country's tourism development policy due to lack of implementation plan and finally the implementation plan for Ethiopian tourism development policy was prepared by Ethiopian Sustainable Tourism Development Project (ESTDP) financed by the World Bank.

Still only having national tourism development policy and its implementation plan is not enough to enhance domestic tourism development in Ethiopia. Due to its unique nature development of domestic tourism needs its own strategy. But there is no domestic tourism development strategy that is designed at national level (Ephrem, 2012; Meron, 2018).

2.3.2 Challenges and Opportunities of Domestic Tourism Development

2.3.2.1 Challenges of Domestic Tourism Development

There are so many challenges that are identified in the tourism literature that hamper maximum realization of the potential of domestic tourism development. These challenges have different faces from country to country, from destination to destination, from time to time and from situation to situation and associated with this while some are policy and marketing related issues

at destination management level, others are more to do with socio-cultural and socio-economic aspects within destinations (Morupisi & Mokgalo, 2017). Some of the domestic tourism development problems and challenges are discussed in the subsequent paragraphs.

One of these challenges is ignorance by governments, tour and travel intermediaries, academicians and other tourism stakeholders as segment of economic, environmental and socio – cultural foundation. Domestic tourism all over the world is a predominant but invisible portion of total tourism activities and lack of universally accepted and/or used definitions of domestic travel activity is largely responsible for this ignorance (Eijgelaar, Peeters, and Piket, 2008). As clearly stated in previous studies tourism stakeholders' prime concern is on developing and promoting international tourism instead of domestic tourism due to its high spending patterns and hard currency issues and foreign visitors are perceived to have more spending power than locals (Morupisi & Mokgalo, 2017; Euromonitor International, 2017; Makhaola, 2015; Ephrem, 2012 & Mazimhaka, 2006). This is one of drawbacks of domestic tourism development that is frequently mentioned in previous and current tourism literatures.

The other factor that is listed in previous studies as hindering issues of domestic tourism development is problems related to statistics and measurement of the sector. As Batinoluho (2017) strongly emphasized existing data or information on domestic tourism sector is inadequate and only collected at attractions that have a system of charging entry fees such as at national parks and museums. That means any movement of domestic tourists to attraction sites that have not designed the system of charging entry fees is not calculated and considered in sector's profile. But designing the system of recording and measuring domestic tourists is mandatory since it serves as a baseline for the future. As Ephrem (2012) and others mentioned the sector's statistics and measurement is mostly ignored since the over all intention is towards foreign tourism. One of constraining issues linked to the sector's statistics and measurement problems is absence of fixed and universally accepted standards of its measurement and statistics. Associated with this UNWTO Commission for East Asia and Pacific (2012) has strongly stressed the problem of domestic tourism statistics and measurement when it is compared to international tourism as follows:

“Statistics on domestic tourism, essentially to any economic analysis, were either unavailable or unreliable since there were no standard measurement systems.

International tourism, on the other hand, had the advantage of a system where arrivals and departures were measured at frontier points and expenditure was in foreign currency.”

Generally, constraints in statistics and measurement are grouped under root causes of underdevelopment of domestic tourism.

The other frequently mentioned issue in previous studies as hampering factor of domestic tourism development is absence of direct policies and strategies. Direct policies and strategies are very crucial and due to non- existence of these documents the sectors’ development has highly affected (Meron, 2018; Morupisi & Mokgalo, 2017; Batinoluho, 2017 and Ephrem among many others).

As it is clearly stated earlier, so many challenges of domestic tourism have been identified in tourism literatures and one of these challenges was low or limited tour and travel culture of citizens.

The weak culture and habit of tour and travel in a given society has been stated as one aspect of hindering issues of domestic tourism (Manyara, 2017; Morupisi and Mokgalo, 2017; Ephrem, 2012; Omolo, 2008; and Mazimhaka, 2006). Furthermore, as Ephrem (2012) clearly mentioned there is also a perception problem of considering tour and travel as luxurious, extravagance and totally not affordable by locals.

According to various studies, inadequate tourist facilities and amenities is one of frequently mentioned challenges of domestic tourism development. Obviously, tour and travel activity must be supported by different types of tourist facilities and amenities and to encourage people to travel it is a need to have good roads and reliable transport system, good accommodation facilities, communication and health facilities, recreational centers and adventure tourist facilities (Ngula, 2010). Insufficiency of these facilities and amenities is one of hindering issues of the sector’s development (Manyara, 2017; Gedecho, 2014; Ephrem, 2012 and Shantha, 1998). Particularly as Shantha (1998) strongly mentioned scarcity of basic tourist needs and wants in pilgrim sites including lack of water, difficulty of obtaining meals, inavailability of sanitary services, transportation problems, environmental pollution, inavailability of health and medical services and related ones are parts and parcel of challenges of domestic tourism development.

One of hot issues that is raised and discussed by previous researchers as hampering issues of domestic tourism development is institutional constraints of the sector and it is one of frequently mentioned impeding issues of domestic tourism development (Signe, 2018; Morupisi and Mokgalo, 2017; Ephrem, 2012 and Shantha, 1998).

Scarcity of skilled and well trained manpower is also identified as one of existing challenges of developing domestic tourism as it is clearly mentioned in various studies (Rui, 2018; Ephrem, 2012; Africa Travel Association and World Bank Competitiveness Report, 2011 and Ethiopian Tourism Development Policy, 2009). Since tourism by its nature is labor intensive, its development needs qualified man power at different levels and most of the time scarcity of skilled man power is mentioned as one of challenging issues of tourism development in general and domestic tourism development in particular.

The other hindering issue that is linked to underdevelopment of the sector is safety and security related problems. Obviously tourism is considered as “peace passport” and the safety and security issues are mandatory in tour and travel activities. But in reality safety and security constraints are hindering the level of domestic tourism development (Signe, 2018 and Africa Travel Association & World Bank Competitiveness Report, 2011 among many others).

The other and frequently mentioned factor as hampering issues of domestic tourism development is low level of education and awareness related problems. Education has the power of broadening horizons and stimulating the desire of human beings to travel (Torkildson, 2012 as cited by Batinoluho, 2017). Actually low level of education obstructs the level of domestic tourism development (Manyara, 2017; Morupisi & Mokgalo, 2017 and Torkildsen, 2012 as cited by Batinoluho, 2017).

Applying backward marketing and promotion strategies and related activities is also frequently mentioned as hampering issues of domestic tourism. Tourism marketing and promotion is one aspect of being successful in destination development, economic empowerment and poverty alleviation (Makhaola, 2015). But most of the time like in many other aspects domestic tourism marketing and promotion is ignored in tourism industry and hence being a challenge for sector’s development (Batinoluho, 2017; Manyara, 2017; Makhaola, 2015 and Ephrem, 2012 among many others).

The remaining constraints that frequently mentioned as hindering issues of domestic tourism development include: poverty, unemployment, constraints of time and disposable income. Availability of disposable income is mandatory to be engaged in any type of tour and travel activity and according to Vanhove (2012 as cited by Batinoluho, 2017) economic factors are determining issues for those likely to have tour and travel and the key of these factors is the income and more importantly the disposable income of a population. Linked with this, the high rate of unemployment is being a challenge for the countries' domestic tourism development (Makhaola, 2015) and like the constraints of disposable income, time constraint is one of the hindering issues of domestic tourism development (Ephrem, 2012; Ngula, 2010 among many others).

2.3.2.2. Opportunities of Domestic Tourism Development

Despite of existence of different hindering factors, domestic tourism movements are increasing from time to time and this is caused by different types of enabling conditions and some of these fertile grounds for this reality can be reviewed as follows. These opportunities can be tourism resource related conditions (both natural and manmade) and others are linked to human capital, others are associated with economic development and the remaining are associated with infrastructural improvements.

Existence of abundant tourism resources is grouped under one of frequently mentioned opportunities of domestic tourism related literatures. Keeping other things unchanged, availability of abundant and varied attraction sites in one country can be considered as a golden opportunity for domestic tourism development (Meron, 2018; Manyara, 2017; Ephrem, 2012; Africa Travel Association & World Bank Competitiveness Report, 2011 and Ethiopian Tourism Development Policy, 2009 among many others).

The other issue that can be enabling condition for domestic tourism development is the population size of the nations. Other things remain unchanged, countries with greater population size have a bigger potential for the development of domestic tourism and countries such as USA and China have benefited more from this reality (Ephrem, 2012). For instance, China has appropriately used this sector as a typical tool to eradicate poverty and generate diversified job opportunities and to cover seasonality gaps of tourism (CTTI, 2011).

On the other hand, improvements in different types of transportation systems can be one opportunity to develop domestic tourism. Improvements in transportation system such as growth of low cost airlines and increased number of airports is expected to lower tourism costs and also helps to increase domestic tourism spending (India Brand Equity Foundation, 2018). According to this foundation, a steady growth and improvement in the ability to access health care and related services, increased per capital income has opened the way to growth of domestic tourism expenditure.

On the other hand, the emergence of new technologies and innovation has mentioned as enabling conditions of domestic tourism development. As Rui (2018) mentioned, the emergence of new technologies and innovation is changing the pattern of tourism development. Both technology and innovation are essential parts of civilizing business and destination competitiveness as well as to advance tourist experience (Affiliate Members Program of the World Tourism Organization, 2011). As strongly stressed by Peters & Pikkemaat (2006) innovation and new service development are tactical features of assuring growth and sustainable wealth generally for every industry and particularly for those industries where markets are saturated and clients choose products and services from all over the world and one of these industries is tourism. Integration of ICT in the tourism industry is an essential for success of any tourism enterprise since it facilitates an individual to access the information of tourism products and services from any where and any time (Bethapudi, 2013).

Further more Taleb Rifai, UNWTO Secretary General, has stated the unique roles of technology and innovation for enhancement of tourism development in 2011 as follows.

“Over past sixty years, the tourism sector has grown to become a pillar of the global economy, driven by political cooperation, social change and far-reaching advances in technology; both in communications and infrastructure.”

CHAPTER THREE: RESEARCH METHODOLOGY

3.1. Research Design

A descriptive research design was used to investigate stakeholders' perspective towards trends, challenges and opportunities of domestic tourism development in Ethiopia.

3.2. Target Population, Sample Size and Sampling Techniques

The study focused on selected key stakeholders of tourism industry in Ethiopia. The sample was drawn from key stakeholders that include governmental bodies, tourism and hospitality service providing entities (both private and public), industry owners' associations, industry professionals' associations, academicians and experts. These were selected due to their direct and indirect role and strong attachment with domestic tourism development of this country.

Due to time and resource limitations the target population of this study was focused on selected key stakeholders of tourism industry in Ethiopia and the following stakeholders of tourism industry in the country were considered as target populations for this investigation.

Purposive and convenient sampling techniques were used to identify appropriate respondents that include officials, experts/ professionals, academicians, tour guides, tour operators and owners.

Table 6: The Sampling Frames of the Research

S. N	Name of Selected Stakeholders	Number of selected respondents	Remarks
1	Ministry of Culture and Tourism	5	2 officials and 3 experts
2	Ministry of Education (Federal TVET Agency)	3	1 official and 2 experts
3	Ethiopian Tourism Organization	5	2 officials and 3 experts
4	Catering and Tourism Training Institute	5	2 officials and 3 senior instructors
5	Ethiopian Airlines	3	1 official and 2 experts
6	Ethiopian Tour Operators Association	2	1 official and 2 experts
7	Ethiopian Hotel Owners Association	2	1 official and 1 expert
8	Ethiopian Hotel Professionals Association	2	1 official and 1 expert
9	Regional Bureaus of Culture and Tourism (9 Regions and 2 City Administrations)	55	22 officials and 33 experts
10	Entoto Tourism Destination Development Project Office	5	2 officials and 3 experts
11	Ethiopian Tour Guides Association	3	1 leader and 2 members
12	Conveniently selected Tour and Travel Companies	15	5 officials 10 senior tour operators
13	Conveniently selected Tour Guides	17	17 tour guides
14	National Museum	5	1 official, 2 experts and 2 guides
15	Ethnographic Museum	5	1 official, 2 experts and 2 guides
16	Addis Ababa Museum	5	1 official, 2 experts and 2 guides
20	Conveniently selected tourism and hospitality academicians	45	45 tourism and hospitality academicians
21	Purposively selected tourism professionals/experts	3	3 tourism professionals/ experts
Total			185

In addition, a total of 10 key informants, two each from tourism officials, tourism senior experts, academicians, tour operators and national tour guides were purposively selected for an indepth interview.

3.3. Data Types and Sources

Both primary and secondary data were used for this study. Primary data were collected by employing questionnaire and key informant interview. The secondary data sources were also inputs for this study and the relevant documents such as policy documents and strategies,

statistical outputs, annual reports, book reviews, history books and other documents related to domestic tourism were cautiously reviewed and collected from appropriate places.

3.4. Data Collection Instruments

Primary data was collected selected from selected stakeholders using questionnaire survey and key informant interview. The questionnaire survey was designed using a five point likert scale, where respondents were asked to rate from 1 strongly disagree to 5 strongly agree.

The instruments (tools) were developed by first sourcing relevant scales from previous literatures and then by refining them to the study area through circulating among senior experts and academicians, there by increasing the content validity of data collecting tools, followed by conducting some sort of pretest on these instruments. Two senior experts with extensive knowledge of questionnaire construction and research in tourism management had evaluated the initial questionnaire and its measures. Their suggestions led to exclusion and merging of several items considered as irrelevant and redundant in measuring trends, challenges and opportunities of domestic tourism development in Ethiopia.

Then, the remaining items of revised questionnaire survey were evaluated and judged by my advisor and items still considered as irrelevant and redundant to study were excluded and merged respectively. Next, the revised questionnaire was tested among 15 respondents in order to assure whether the items were clear and interpreted in the way they were proposed. Then, it was preceded to the final draft with some amundements and clarifications.

In order to acquire accurate and the required information, the questionnaire survey was translated in to national language (Amharic). The prepared questionnaire survey was a self completed type in which each respondent fills by him/ her self. To get appropriate responses from respondents, each and every respondent was carefully supervised by the researcher and assistant data collectors in clarifying the questions. A total of 10 data collectors (enumerators) were employed and adequate orientation was given to undertake this survey and the over all data collection process has taken two consecutive months.

Key informant interview was the second most important data gathering tool that was used by the researcher and this was made with 10 key informants drawn from different organs as stakeholders of domestic tourism development in Ethiopia. For these interview, key informants

with high professionalism, insightful knowledge and experience were selected based on purposive and convenience sampling techniques.

3.5. Data Analysis Techniques

Quantitative data was analyzed using descriptive statistics and Exploratory Factor Analysis (EFA). The items were entered into an exploratory factor analysis (EFA) by using principal axis factoring with direct oblimin to anticipate a high inter- correlation between factors. Finally, the results of the analysis of quantitative data were augmented by qualitative data to be analyzed using content and discourse analysis.

CHAPTER FOUR: RESULTS AND DISCUSSION

4.1. General Characteristics of the Sample

This section describes the main characteristics of the sample in terms of gender, age, education, occupation, and length of experience in the sector.

Table 7: General Profile of Survey Respondents

S. No	Profile of Respondents	Frequency	Percentage
1.	The gender of respondents		
	Male	118	74.2
	Female	41	25.8
	Total	159	100.0
2.	The age of respondents		
	18 – 27	31	19.5
	28 – 37	99	62.3
	38 – 47	19	11.9
	48 and more	10	6.3
	Total	159	100.0
3.	Educational level of respondents		
	Certificate and below	3	1.9
	Diploma	11	6.9
	Bachelor Degree	75	47.2
	Masters Degree and above	70	44.0
	Total	159	100.0
4.	The occupation of respondents		
	Tour Guides (Employed + Freelancers)	14	8.8
	Academicians (working in different universities and colleges)	42	26.4
	Experts and officials (working in tourism and hospitality sectors)	66	41.5
	Tour operators (investors, owner managers and employed operators)	37	23.3
	Total	159	100.0
5.	The amount of work experience of the respondents in tourism sector		
	Less than 5 years	45	28.3
	5 – 10 years	65	40.9
	11 - 15 years	37	23.3
	More than 15 years	12	7.5
	Total	159	100.0

As shown in table 7, 74.2 % of the respondents are males and the remaining 25.8 % are females. As far as the age of respondents' is concerned, the majority of respondents (62.3 %) are existed between the age categories of 28 – 37, 19.5 % the respondents are existed between the age categories of 18 – 27, 11.9 % of them are existed between 38 – 47 and the remaining 6.3 % of respondents are existed on the age category of 48 and more.

With regard to educational level of the respondents, the majority of them are holder of Bachelor Degree (47.2 %) followed by Master's Degree and above (44%). The remaining are Diploma and Certificate and below holders (6.9 % and 1.9 % respectively). From this, one can say that the selected respondents have better educational level to understand and fill the questionnaire and it is possible to conclude that the majority of respondents (91.2 %) are Bachelor Degree and above holders and they can easily understand the issue of this study.

Concerning the occupation of the respondents, the sample comprised experts and officials (41.5 %), academicians (26.4 %), tour operators (23.3 %) and tour guides (8.8 %). Regarding length of work experience of the respondents in the sector, the majority of respondents (40.9 %) have work experience of 5 – 10 years followed by the respondents that have work experience of less than 5 years (28.3 %) and 11 – 15 years (23.3 %) respectively. The remaining (7.5 %) of respondents have work experiences of more than 15 years. From this, it can be concluded that nearly 71.7 % respondents have work experiences of more than 5 years in tourism sector. Therefore, the respondents are capable enough to understand the issue and to respond the questionnaire survey appropriately.

Table 8: Characteristics of Key Informants

S.N.	Categories of Key Informants	Number of key informants selected	Length of work experience
1	Officials	2	One with 12 years experience and the other with 8
2	Experts	2	One with 10 years experience and the other with 12
3	Tour operators	2	One with 10 years experience and the other with 9
4	National Tour guides	2	Two with 9 years experience
5	Academicians	2	One with 11 years experience and the other with 7
Total		10	

Table 8 presents the characteristics of the 10 key informants drawn from different organs. For these interview key informants with high professionalism, insightful knowledge and experience were selected based on purposive and convenience sampling techniques.

4.2. Trends of Domestic Tourism Development in Ethiopia

As stated in chapter 1, one of the specific objectives of this study was exploring trends of domestic tourism development in Ethiopia. In order to investigate this, trends of domestic tourism development in Ethiopia were assessed by using 8 items extracted from ranges of previous literatures (Domestic Tourism Growth Strategy of South Africa, 2004 – 2007; Domestic Tourism Growth Strategy of South Africa, 2012 – 2020; Domestic Tourism Survey of Malaysia, 2012; Domestic Tourist Survey of India, 2002-2003 and Euro monitor International, 2017).

Respondents were asked to rate the extent of their disagreement or agreement on these extracted factors as trends of domestic tourism development in Ethiopia. These 8 items that intended to measure trends of domestic tourism development in Ethiopia were entered in to an exploratory factor analysis (EFA) using principal axis factoring with direct oblimin, followed by Cronbach's alpha reliability testing (See Appendix III). As it is clearly stated in chapter 3, the questionnaire survey was designed by using a five point Likert scale for rating the response by options of strongly disagree, disagree, undecided, agree and strongly agree. Each response options have a value of 1, 2, 3, 4 & 5 respectively. For better decision making the responses with means above 3 are regarded as agreement category while responses with mean less than 3 are perceived as disagreement category.

From these 8 items, 2 were dropped through exploratory factor analysis. The EFA of the remaining 6 items gave as a two - factor solutions as shown in Table 9 below.

Table 9: Results of analysis of trends of domestic tourism development in Ethiopia

Factors	Items	Factor Loading	Mean	SD	Cronbach Alpha(α)
F1- Rate and significance of domestic tourism development	The socio-cultural significance of domestic tourism in Ethiopia has increased in the past 5 years	0.829	2.91	0.953	0.83
	The economic significance of domestic tourism in Ethiopia has increased in the past 5 years	0.776	2.97	0.987	
	The environmental significance of domestic tourism in Ethiopia has increased in the past 5 years	0.669	2.98	0.964	
	The rate of domestic tourism trips has increased in the past 5 years in Ethiopia	0.549	3.25	0.974	
	Grand	0.706	3.03	0.97	
F2-Government support and investment on domestic tourism	Domestic tourism investment in Ethiopia has increased in the past 5 years	0.692	2.81	1.034	0.63
	There was a strong government support to promote domestic tourism in Ethiopia in the past 5 years	0.607	2.13	1.06	
Grand	0.65	2.47	1.05		

Table 9 shows the rating of respondents on extracted factors as trends of domestic tourism development in Ethiopia. As it is clearly stated above, the EFA of the remaining 6 items has provided two - factor solutions namely; - “trends on rate and significance of domestic tourism development” (Factor 1) and – “trends on government support and investment on domestic tourism” (Factor 2).

Factor 1 contains 4 items namely: the socio – cultural significance of domestic tourism in Ethiopia has increased in Ethiopia in the past 5 years, the economic significance of domestic tourism has increased in the past 5 years, the environmental significance of domestic tourism has increased in the past 5 years and the rate of domestic tourism trips has increased in the past 5 years in Ethiopia. Factor 2 contains 2 items namely: domestic tourism investment in Ethiopia has increased in the past 5 years and there was a strong government support to promote domestic tourism in Ethiopia in the past 5 years.

The finding on table 9 regarding trends on rate and significance of domestic tourism development (Factor1) with grand mean and standard deviation of (*mean = 3.03, SD = 0.97*)

reveal that domestic tourism development in this regard is not not fascinating, on the other dimension, trends on government support and investment on domestic tourism (Factor 2) with grand mean and standard deviation of ($mean = 2.47, SD = 1.05$) clearly suggests that domestic tourism in this regard is even very low.

This finding therefore reveals that even though there is practical involvement of Ethiopians in domestic tourism and there is a slight progress from time to time by its own, significances of domestic tourism for economic, environmental and socio – cultural issues of the country are not exploited and maintained in a good manner and the sector as a trend is not matured in Ethiopia.

Results from the analysis of key informants also confirm this. For instance, one key informant (K1) has explained the tendency of the current trends of domestic tourism development of Ethiopia as follows.

“Regarding the current status of domestic tourism development in Ethiopia, we see some individuals getting involved in certain travel purposes, particularly religious trips are growing from time to time. In this respect, we can say that religious travel associations are playing better roles. More or less domestic tourism is in existence. For instance, certain individuals sometimes travel from place to place for religion, business, educational and other purposes. However, apart from this, domestic tourism is not getting due attention when compared to international tourism, truly speaking, such tourism is not getting the necessary guides, affordable accommodation facilities and amenities and travelers themselves are not ready to perceive themselves as tourists to get involved by assigning the necessary expenses and costs. So, domestic tourism in this country is not customary. On the other hand, either the Ministry of Culture and Tourism or other stakeholders do not have tendencies of registering such activities/ movements as tourism activities. And even the travelers themselves do not know what they are doing in this regard. So, in general terms, even though there are now and then some initiatives in this sector, but mobilizing such activities in the level of international tourism is still far behind.”

Another key informant (K7) has also forwarded the following statement regarding trends of domestic tourism movement and development in Ethiopia:

“There is no as such active domestic tourism movement in Ethiopia. Even we think of its existence, we can only observe travels in connection of religious and related purposes and even there is no an institutional structure that helps to mobilize and organize the sector. In total, I don’t see any domestic tourism movements as such. Even those which are said to exist are being conducted with the initiatives of either some individuals or associations, and when seen at the national level, there are no as such major activities launched to mobilize the sector.”

Majority of key informants are agreed regarding existence of domestic tourism movements in Ethiopia. Even though, there is a progress in some travel purposes like religion, educational trips, business and related issues due emphasis is not given to this sector and there is still much to be done as foreign tourism development. It is not mobilized at national level and it is also restricted to some travel purposes particularly religion, education and business. In addition to this, its positive impact on economy, environment and socio – cultural aspects are invisible. The above issue is also supported by the following statement which is explained and stated in different dimension by key informant (K3) as follows:

“The domestic tourism movement is existing in Ethiopia. Not for these days, it has been observed and practiced for many years. And in accordance with different documents, domestic tourism is not only common in the country, but it is the first practiced form of tourism even among the world over. And at Ethiopia level, even though the activities have not reached at the required level; in fact, there is domestic tourism practice in the real sense. Individuals travel from place to place to meet their different purposes. However, its contribution towards the economic, environmental and socio- cultural needs of the country are at minimum stage. This is mainly due to its low level of development. And regarding the main purposes of the trips are concerned, the religious – inspired trips are taking the majority. Apart from this conference and medical trips are also involving the majority. And regarding the attention given to the sector is concerned, it is known, so far international tourism takes the major slice and full attention of every actor was towards international tourism. And it is also known that the infrastructure, promotion and the general tourism development was designed based on the needs and wants of international tourists. Previously the concerned entities especially the higher officials

have not taken this sector as beneficial. So virtually no entity has considered it as necessary.”

Domestic tourism has huge potential in maximizing different types of positive impacts on economy, environment and socio- cultural issues of a given country typically for the nations like Ethiopia. But this significance should be exploited in a good manner. Connecting with this issue, one key informant (k4) has forwarded the following:

“Even though the current level of domestic tourism in Ethiopia is not at equal status with that of developed nations, I think it has a good beginning. For instance, the educational tours conducted by high schools and university students are in progress. In addition, trips made by a few of private and government employees at the end of their budget years are also considered as good instances for this. However, when it is generally seen in light with the potential of our country, we can say that it is still untapped sector. Domestic tourism is a tested sector for cross-cultural understanding and the cohesion of the national unity. And this is true when thinking about the proverb; `Seeing is believing and also seeing supersedes hearing`. This sector is one of the true solutions to resolve conflicts and displacements, conventionally occurring in our county. And this is because arranging visits to different places normally supersede the rumor being disseminated via the social media.”

As it is discussed above mostly practiced travel purposes of domestic tourism movements in Ethiopia are mostly associated to religion, education and business. In opposite way, other travel purposes particularly nature based tourism including adventure and activity based tourism purposes are not practiced and trended in Ethiopia. Regarding to this, one key informant (K5) has stressed the issue as follows:

“Even though domestic tourism movement in Ethiopia is not satisfactory and few in number, its number is increasing in the past 5 years. However, its purpose is connected with the celebration of religious festivities. For instance, it can be possible to take epiphany, Christmas, Alnejashie, Dire Sheke Hussen, Kulebe Gabrael and Aksum (Hedar Tsion) festival seasons as best examples for this.”

The finding of this study is even consistent with what is indicated in previous studies regarding existing trends of domestic tourism development. Domestic tourism in many developing countries is nearly non-existent with few travelers mainly visiting their friends and relatives (Mariki et al., 2011). Domestic tourism was the first form of tourism activities in the world even though it is not well understood by many countries (Pieret, 2011). According to Ephrem (2012) most of domestic tourism activities and movements in Ethiopia are connected to religious trips. Thus, as Morupisi and Mokgalo (2017) and many others mentioned, the current level of domestic tourism and its economical, environmental and social impacts are not satisfactory and when it is seen in light with our potential, it is still untapped segment of tourism.

4.3. Challenges of Domestic Tourism Development in Ethiopia

One of the specific objectives of this study was identifying challenges of domestic tourism development in Ethiopia. In order to fulfil this, challenges of domestic tourism development were identified by using 15 items extracted from ranges of previous studies (Meron, 2018; Euromonitor International, 2017 ; Morupisi & Mokgalo, 2017; Gedecho, 2014; Manono and Rotich, 2013; Domestic Tourism Growth Strategy of South Africa, 2012 – 2020; Ephrem, 2012; Pookaiyaudom, 2012; Tadesse, 2012; UNWTO Commission for East Asia and Pacific, 2012; Ethiopian Tourism Development Policy, 2009 and Omolo, 2008 among many others).

From these 15 items, 8 were dropped through Exploratory Factor Analysis. The EFA of the remaining 7 items gave as a three factor solutions as presented in the table below.

Table 10: Results of analysis of challenges of domestic tourism development in Ethiopia

Factors	Items	Factor Loading	Mean	SD	Cronbach Alpha(α)
F1- Limited tour & travel culture and promotion	Poor performance in promotion	0.953	4.19	0.764	0.68
	Limited tour and travel culture amongst Ethiopians	0.458	4.26	0.823	
	Grand	0.706	4.225	0.794	
F2 - Government strategic direction and priority problems	Absence of nation – wide domestic tourism development strategy	0.895	4.02	0.958	0.63
	Giving priority to international tourism in expense of domestic tourism	0.477	4.12	0.806	
	Grand	0.686	4.07	0.882	
F3- Capacity related Problems	Research gaps on domestic tourism	0.602	4.22	0.919	0.59
	Inconvenient institutional structure of domestic tourism	0.565	4.09	0.825	
	Lack of skilled man power	0.558	3.53	1.195	
Grand		0.575	3.95	0.979	

As shown in the table above, the EFA of the remaining 7 items has provided 3 factor solutions namely: limited tour and travel culture and promotion (Factor 1), government strategic direction & priority problems (Factor 2) and capacity related obstacles (Factor 3) as existing challenges of domestic tourism development in Ethiopia. Factor 1 contains two items as obstacles of domestic tourism development in Ethiopia namely: poor performance in promotion and limited tour and travel culture of Ethiopians. Factor 2 contains two items as obstacles of domestic tourism development in Ethiopia namely: absence of nation – wide domestic tourism development strategy and giving priority to international tourism in expense of domestic tourism. Factor 3 contains three items as obstacles of domestic tourism development in Ethiopia namely: research gaps in domestic tourism, inconvenient institutional structure of domestic tourism and lack of skilled man power.

As it is clearly mentioned on table 10, the result generally reveals that limited tour and travel culture and promotion (Factor1) with grand mean and standard deviation of (*mean = 4.225, SD = 0.794*), government strategic direction and priority problems (Factor 2) with grand mean and

standard deviation of ($mean = 4.07, SD = 0.882$) and capacity related obstacles (Factor 3) with grand mean and standard deviation of ($mean = 3.95, SD = 0.979$) are the leading challenging factors of domestic tourism development in Ethiopia.

The data that was obtained from key informants also strengthens the above challenges mentioned in this finding as obstacles of domestic tourism development in Ethiopia. The most frequently mentioned problems that are raised by key informants are: the absence of domestic tourism development strategy, structural problem of the sector, budget constraints, priority problems, absence of consistent data, coordination and collaboration problems of the stakeholders, awareness problems, research gaps, poor saving and touring culture of citizens and related issues as the leading obstacles of domestic tourism development. For example, one key informant (K6) has strongly explained the challenges of the sector as follows.

“Except some beginnings, I don’t think that both the government and other tourism stakeholders have given the due attention to domestic tourism development. And also the citizens don’t take domestic tourism as one means of the major entertainment options, our saving culture is also very poor and apart from this, there are fundamental economic constraints. There are also fundamental awareness constraints. In this respect, some think that tourism means only making trips either to Dubai or Bangkok or elsewhere. There is also a problem of not taking domestic movements as part of tourism. Therefore, both the government and the remaining stakeholders should give especial attention to the development of the sector. Especially the government should give special attention to the sector. Attempts should be made to ensure its inclusion in the school curriculum and intensive awareness creation should also take place.”

One of the challenges of domestic tourism development that was repeatedly mentioned by key informants was research problems of the sector. One key informant (K1) has stated the role and its existing situation of research in domestic tourism and this statement can be stated as follows:

“In order to design either policies or strategies and to resolve the existing challenges or to lay down appropriate awareness creation activities around this area, conducting studies is essential. However, so far regarding the domestic tourism we don’t actually see studies being made in organized manner and exhibited at different workshops and seminars. Even we don’t see this sector being tabled as an item of research agenda. As

regards the demand and supply sides of the sector, a lot of studies should have been conducted. And even now due to lack of proper attention, for most tourism means that which solely involves international travelers, and due to this backward looking, studies which should have been conducted have become abnormally lower. “

The other key informant (K2) has illustrated this issue in another dimension as follows:

“Regarding the attention paid for domestic tourism studies and researches is concerned; even there is no research center or institute at national level that conducts timely researches and studies particularly focusing on tourism. In other sectors, for instance, there are such research centers or institutes including health and agricultural sectors. And this is one of the attaches to render the development of the sector.”

The other and one of highly raised and discussed issue as challenges of domestic tourism development was the priority problems of the sector. According to the data obtained from these key informants, domestic tourism is not equally treated as international tourism. Due to this reason, due emphasis is not given to this sector by respective stakeholders including the government, tour operators, travel agencies, hotels and similar establishments. For example, as one key informant (K1) illustrated clearly, its ignorance at different level seems like the following:

“Both the government and other tourism stakeholders have chronic problems of working on the domestic tourism by giving the due focus. This is mainly due to the belief that mostly we visualize foreigners as normal tourists, and even tour and travel companies pay attention to foreign tourists. This is due, mainly, in seeking better tips, I should say. Or else as foreign tourists generate the foreign currency, they sacrifice their entire period of time in the handling of such tourists. Even at national level when the annual revenue generated from tourism sector is evaluated and calculated, the only portion of income gained from foreign tourists is reported and even fulfillment of tourist infrastructures and related issues are arranged by only considering the interests of foreign tourists, secondly, in the eyes of travel and tour companies, it is generally believed that domestic tourists are not capable enough to pay. Due to little experience

and capability problems, domestic traveler wants to spent his/her nights with one of his/her relatives or the remaining ones want to share with others. Those may be responsible reasons for this. The government's primary attention is also inclined towards foreign tourists and hence domestic tourism is not its concern. Main evidence for this is absence of domestic tourism strategy. Different types of initiatives and activities are not designed timely. By designing a strategy, offering incentives for instance, praising employees with best achievement with free trip may contribute in the development of the sectors, or else leave vacation with pay (forwarding holiday with pay) to those employees wishing to get involved in domestic tourism trips, as it is implemented in foreign countries. Furthermore, we have no consistent data and documentation of this sector."

As far as the priority problem of the sector is concerned, tour and travel companies are also claimed as well. For example, one key informant (K2) has explained this ignorance as follows:

"... Domestic tourism is ignored sector; even among other stakeholders. For example, if we take tour and travel companies, they have critical problem of worshipping foreign tourists. They have to focus on domestic tourism as well. It is better to them to take it as their social responsibility. It is one of profit oriented sector. It has its own positive economic impact even though it may not equal with that of the foreign one, it is still a profitable sector. Even in terms of number, foreign tourists are not comparable with that of domestic ones. Even though the income of a trip per individual is not that much, as we can let it proceed all the years round, in the long run it is a very feasible sector. In addition, the domestic tourism is very supportive to the development of foreign tourism. Beyond that, the domestic tourism is a shock observer in challenging times."

Regards to the above statement that was forwarded by (K2) and others, one key informant (K4) has forwarded the new insight that slightly contradicts with the views of majorities and this new outlook that was forwarded by (K4) is stated as follows.

"...concerning our main focus area of the tourism market, on behalf of our tour and travel company, we focus on both. So, both international and domestic tourism are our target areas. We don't make any discrimination and regarding domestic tourism market

is concerned, we organize tour programs to help domestic tourists to visit areas that are getting less attention by identifying citizens whose desire of knowing their country and those with who can afford....”

The following key informant (K8) has passionately explained the basic reasons why tour and travel companies are not interested to do their business in this sector.

“...concerning our focus area of tourism market, the main objective of our establishment is introducing the real identity of Ethiopia to the rest of the world. Therefore, we have been doing focusing on foreign tourism. Because this is the particular part of tourism that can benefit us and the country as well; however, we still work partially on the domestic tourism as well. But domestic tourism in the country has lots of challenges. There are lots of important and fundamental things (assignments) to be done by the government at the grass root level. Tour and travel companies do not have as such motivation and inspirations to engage in this sector for several reasons. This sector has different types of difficult situations in our country context. From the beginning nothing is done on the sector. Starting from promotional activities of the sector it requires huge financial capacity. Its investment cost is very high. And it is sometimes difficult as a single private and profit oriented enterprise to handle all these things. On the other hand, after overcoming all the obstacles, the economic benefit expected to attain is not that much attractive. Unless you hold the opinion of contributing your own social responsibility as a citizen this sector is not a type of business for generating income. But if the government and other concerned stakeholders work together and our natural tourism resources protected well and if the ups and downs as well as the bureaucratic problems had been eradicated, it would have registered better result. Especially when we come to the lower governmental organizational structure, even getting a single information costs us quite great ups and downs and even there are offices that refuse to act and respond if it is not for foreign tourists.

Regarding priority problems and ignorance of domestic tourism by stakeholders particularly the issue of government and tour and travel companies is concerned, one key informant (K7) has also added the feeling as follows:

“This sector is generally a forgotten one in the face of the government and other stakeholders. Even tour and travel companies are not interested to invest/ actively work in the sector since there is no tour and travel culture among Ethiopians. Additionally, as most of the travel agencies and tour operators focus area is on foreign tourism, they are not seen focusing on domestic tourism...”

Actually the ignorance of domestic tourism development was one of highly discussed issues as challenges of current domestic tourism development in Ethiopia. One key informant (K5) has emotionally mentioned lists of hindering issues of domestic tourism development in Ethiopia and also forwarded side effects of worshipping on international tourism market by slightly contradicting points raised regarding why travel intermediaries are not interested in this sector.

“...when the previous tendency is recalled, most of the focus of all the stakeholders was on searching foreign tourism. Even tour operators and travel agencies have not understood the existing potentials and realities of the domestic tourism. The Ethiopian population is estimated to stand at 100 million. Among this, even the urbanizes could properly participate in tourism, a lot could have been gained. But many companies and other actors haven't given the due focus to this sector. Most of their focus is on foreign tourism. There are so many manifestations for this ignorance. Simply it is enough to search their websites and other promotional tools. Their websites are written in English. Other promotional works are also in English. They can't attract those participants in the domestic tourism. Based on this, they haven't properly understood the potential of the domestic tourism. Even the government is not working properly to develop the domestic tourism in this country. Formally different know your country clubs and associations established around schools were showing better activities. At present, even these have been much weakened. And even the entire culture and tourism offices and structures are not seen working on domestic tourism. Basically, regarding the obstacles of the development of the sector, the forgoing obstacle is the minimum focus (low attention paid to this sector) on the part of the stakeholders. Secondly, the absence of appropriate itineraries (travel plan), price lists and promotional materials particularly designed for domestic tourists. The third one is the absence of strategy and legal frame work either on the part of the ministry of culture and tourism and at regional level that enforces to give

proper attention to the sector. The other problem is the absence of unique pricing strategies in hotels, restaurants and other service delivering entities that fits with the purchasing power of domestic tourists. The other problem is the high ticket price in the domestic flights of the Ethiopian Air Lines since it has a uniform ticket price. Other airlines adjust their prices during the summer seasons and during off seasons. The other important issue to be considered is the fashions of foreign tourists and their fashions are changeable and also unavailable with all times. What will be done if they never come? As they have lots of attractive options throughout the world. But in the domestic tourism the actors have nowhere to go, since it is their own home land.”

Regards to this ignorance, media is also claimed as well. For example, one key informant (K1) has explained this ignorance as follows:

“Even the mass media is not working at expected level in respect to the development of domestic tourism. And so, the medias should properly discharge their duties. And related to travelling, documentary films helpful to uplift our travelling culture should be organized and exposed to the audiences.”

But one key informant (K7) has provided the following explanation that contradicts with the above statement regarding the current performance of media in promoting domestic tourism as follows:

“Regarding the focus that is given by the media to this sector, I think it is working even better than that of the government. I also think that it is discharging of its proper duties in terms of promotions and other matters. And I think they can play even the protagonist role. And I also think the media should improve their contributions by allocating more budgets on the sector.”

In addition, key informants have also forwarded different obstacles that hamper the current level of domestic tourism development in Ethiopia. The most frequently mentioned problems are poverty associated with low level of disposable income, regulatory problems, absence of different types of initiatives and campaigns, problems related to ethnicity and discrimination, no

appreciation and scarcity of admiration, attitudinal and behavioral problems of domestic tourists and so on. Associating with these issues, one key informant (K6) has said the following:

“In respect of our country, there are problems not only in participation, even those participants involved in domestic tourism activities have also chronic problems. Due to limited touring culture the participants themselves have basic problems of understanding the nature of tourism. According to their perception, a tourist attraction site means having exceptional gigantic building, or if not, a huge object. Others are not considered as attractions. They are incapable of understanding the value of attraction sites, they have basic problems in appreciation and admiration of attractions especially natural attraction sites. They have problems of interconnecting the national relics with only the churches, monasteries and mosques as well as other religious sites. And regarding the length of stay, they want to take a short period of time. Mostly pre-travel arrangement phase is non – existent. They don’t come to stay long with proper arrangements they mostly want to return after staying 1 or 2 days only. And even our citizens don’t take tourism as one of the main entertainment options.”

Designing appropriate regulation and legislation systems is one of basic issues in any type of development and associated with this, one of hindering issues raised and discussed by key informants linked with legal aspects of domestic tourism development was regulatory problems of the sector. As it is known, different types of incentives are provided to tour and travel companies including importing duty free vehicles. But as one key informant (K1) strongly stressed this form of incentive is only applicable and stricted to international tourism business and hence it is not applicable for domestic tourism market as it has stated as follows:

“The tour vehicles imported by the tour and travel companies in duty free are not encouraged to be used for domestic tourists since they are targeted towards international tourists and using those vehicles for locals is prohibited by Ethiopian government. And so, such a directive does not encourage domestic tourism to thrive.”

One of the critical issue that raised by key informants as hindering issues of domestic tourism development in Ethiopia was absence of different types of initiatives and campaigns that help to

boost domestic tourism trips in the country. Associating with this, one key informant (K1) has mentioned the following:

“Since there are attitudinal problems at different levels, launching awareness creation campaigns leading the citizens towards knowing their culture and tradition is important. There are certain informal clubs and associations established with the name, “know your country clubs.” But these clubs, due to lack of proper support and guidance, do not register the required results by working on their own. Thus, on the basis of strategic plans to implement, different types of actions and initiatives should be taken and the type of mottos including: “those who don’t discover Ethiopia are not Ethiopians” should be designed to improve tour and travel culture of citizens. For instance, a Chinese who climbed to the Great Wall of China is crowned as a Hero. And so their motto runs; as “to be a Hero one must climb up to the top of the Great Wall”. Based on this, every Chinese, in order to become a Hero, climbs this wall. And here in Ethiopia organizing (introducing) such types of motivating mottos should be the duty of each and every official and civic society member and trying other methods are also commendable ideas. For instance, in this respect many Ethiopians have visited the Great Renaissance Dum and this was one of the motivating effort and golden opportunity to develop the sector. But unfortunately we are unable to sustain such types of endeavors. To cite, the “Guzo Adwa” travelers can be a case in this aspect. These individuals can be taken as one of tourist products in this country. Truly speaking, a huge number of individuals have been involved in this travel. The Adwa travelers have created precedence to the Mekdela travelers. If uninterrupted awareness creations are put in place towards the encouragement of such activities, the next generation can follow this path.”

The other obstacle that is differently mentioned as one of challenging issues of domestic tourism development in Ethiopia is unequal distribution of resource at national level and one key informant (K3) has strongly stressed this issue as follows:

“For me, the other obstacle for development of domestic tourism in this country is existence of unequal and unjustifiable resource distribution in the country. Wealth distribution in this country is not healthy. Over 50% of the wealth of the country is

accumulated (found) in Addis Ababa. And making domestic tourists always to originate from Addis Ababa is impossible. And even if so, it can't be feasible. The other areas should be developed economically. Developing both the urban and the rural areas will help to improve the citizen's standard of living thereby further helping the capacity of the travels to develop likewise."

The other challenge that was mentioned by key informants was existence of different types of damages and distractions occurring on tourist attraction sites. For instance, one key informant (K8) has emotionally mentioned the issue as follows:

"...For instance one of the indicators that the sector lacks the required attention is simply observing on what our destination (attraction) sites look like practically on the ground. Frankly speaking, a lot of damages and distractions are occurring on our nature based attraction sites. As Africans we have reached at a level where we are striving very hard to see wild animals. We ourselves have nearly perished our wild animals. For example, if we see our nearby parks, they are being perished. We are perishing our lakes as well. Preserving nature is above politics. Giving priorities to human being does not mean perishing our natural resources. Of late, Lake Abayata Shale is dwindling. And this was the way how we perished Lake Haromya. We don't know what is in store. Up to now we have perished a lot of our natural wealth. We are perishing the Neche Sare National Park. And so, which natural resources are we going to present ether before the domestic or the foreign tourists? Properly preserving our natural resources is not politics. Actually, as it's always said we have multiple resources for tourism. Indeed, Ethiopia is endowed with abundant natural resources. However, lack of proper preservation of our natural attraction sites would cost us a lot now and in near future. When the Neche Sare Natural Park perishes, if it was possible to treat it as common wealth by the Southern Nations and Nationalities Regional State and the Oromia Regional State, the park wouldn't have been harmed this much. Our other problem is the coordination and collaboration problems of the stakeholders in this sector. And oddly enough such institutions are in place and of course Tourism Transformation Council has been established. But in fact it is not effective and functional as it was expected."

Even the results of this research finding towards challenges of domestic tourism development have strong alignments with previous studies as well and these studies are discussed and reviewed as follows. One of challenges of domestic tourism development identified in this study was limited tour and travel habit of citizens and this issue has previously studied in different literatures as an obstacle of the sector's development. For instance, the weak culture and habit of tour and travel in a given society has illustrated as one aspect of hindering issues of domestic tourism sector (Morupisi & Mokgalo, 2017; Manyara, 2017; Ephrem, 2012; Omolo, 2008 and Mazimhaka, 2006 among many others). Further more, as strongly stressed by Ephrem (2012), there is a perception problem of considering tour and travel activity as luxurious, extravagance and not affordable by locals. There fore, the researcher's finding is highly linked with what has studied so far by different researchers.

A research gap in domestic tourism is also one of frequently mentioned issues in tourism literature as challenges of domestic tourism development. For example, according to Mazimhaka (2007) and Morupisi & Mokgalo (2017) domestic tourism is still one of unobserved themes in African tourism scholarship. Most of the time tourism research is restricted to international tourism and most studies only analyze international tourism either because of unobtainability of data on domestic tourism or because of underestimating of this sector (Ephrem, 2012 and Cortes – Jimenez, 2008). There fore, the researcher's finding in this regared is highly supported by previous studies and literatures.

Poor performance in promotion has also frequently forwarded as hindering issues of domestic tourism in different types of tourism literatures. As obviously said designing appropriate tourism marketing and promotion strategies has listed as one of supporting issues to be successful in destination development and management since it helps to create the path for community development, economic empowerment and poverty alleviation (Makhaola, 2015). But in reality domestic tourism marketing and promotion is ignored in tourism industry (Batinoluho, 2017). Hence, inadequate tourism marketing and promotion is one of frequently mentioned challenges for development of domestic tourism (Batinoluho, 2017; Manyara, 2017; Makhaola, 2015 and Ephrem, 2012 among many others). There fore, the researcher's finding is highly supported by previous studies investigated so far.

There are also diverse studies regard to priority problems and ignorance of the sector. For instance, as mentioned by Mazimhaka (2007) and Morupisi (2017), the planning and promotion of tourism in most African countries is tending to international tourism and so many reasons have justified for this. Developing countries at all times beautify international tourism for its capacity to generate foreign exchange rate and hence ignore domestic tourism as one area of development and field of study (Ephrem, 2012 and UNWTO Commission for East Asia & Pacific, 2012 from many others). Due to this reason, rare attention is given to this sector by tourism stakeholders including government, travel intermediaries and academicians (Meron, 2018 and Ephrem, 2012 among many others). The same is true in Ethiopia, according to Ephrem (2012), current level of domestic tourism development in in the country is not satisfactory and competitive and neglected segment as well. Honestly speaking, the governments and the remaining tourism stakeholders mostly focus on developing and promoting international tourism instead of domestic tourism due to high spending patterns and hard currency issues of foreign tourists since they are perceived to have more spending power than locals (Morupisi and Mokgalo, 2017; Makhaola, 2015; Ephrem, 2012 and Mazimhaka, 2006 among many others). There fore, the researcher's finding in this aspect is highly supported by previous studies.

One of hindering issues of domestic tourism development frequently mentioned and listed in previous studies is institutional and structural problems of the sector. Designing appropriate and suitable structure is mandatory to sectors' development but in reality the existence of inconvenient institutional structures is repeatedly listed as existing challenges of domestic tourism development (Signe, 2018; Morupisi and Mokgalo, 2017; Ephrem, 2012 and Shantha, 1998). There fore, the researcher's finding is highly supported by previous studies.

One of the finding as the challenge of domestic tourism development in Ethiopia was absence nation – wide domestic tourism development strategy. Direct policies and strategies are one of driving forces for sector's development. As it is mentioned in varies studies, absence of direct policies and strategies is grouped under root causes for underdevelopment of domestic tourism (Meron, 2018; Morupisi and Mokgalo, 2017; Batinoluho, 2017 and Ephrem, 2012).

The other and one crucial issue raised in this study as existing challenges of domestic tourism development in Ethiopia is existence of inadequate tourist facilities and amenities. This finding is also supported by various literatures conducted so far. Tour and travel activities should be supported by different types of tourist facilities and amenities and to encourage people to travel it is a need to have reliable transportation system, good accommodation facilities, communication and health facilities, recreational centers and related issues (Ngula, 2010). But in reality, insufficiency of tourist facilities and amenities is listed under hindering issues of domestic tourism development (Manyara, 2017; Ephrem, 2012; Ngula, 2010 and Ermias, 2010 among many others). Further more, as Shantha (1998) stressed out scarcity of basic tourist needs and wants in tourist destinations particularly in pilgrim sites including lack of water, difficulty of obtaining meals, inavailability of health and medical services, environmental problems of beggars etc are parts of challenges of domestic tourism development. There fore, the finding of this researcher is highly in this perspective is supported by various studies conducted so far.

4.4. Opportunities of Domestic Tourism development in Ethiopia

One of the specific objectives of this study was identifying existing opportunities of domestic tourism development in Ethiopia. In order to meet this, proposed factors as opportunities of domestic tourism development were identified by using 11 items extracted from ranges of previous studies (Gedecho, 2014; Tadesse, 2012; Ethiopian tourism development policy, 2009 and Euro monitor International, 2017 among many others).

From these 11 items, 5 were dropped through Exploratory Factor Analysis. The EFA of the remaining 6 items gave as a two factor solutions as presented in the table below.

Table 11: Results of analysis of opportunities of domestic tourism development in Ethiopia

Factors	Items	Factor Loading	Mean	SD	Cronbach Alpha (α)
F1-Economic growth and policy related issues	Growth in domestic tourism business in Ethiopia	0.982	3.21	1.041	0.66
	Continuous economic growth in Ethiopia	0.623	3.04	0.983	
	Grand	0.802	3.13	1.01	
F2- Availability of abundant tourism resources and Potentials	Greater population size	0.700	4.06	0.932	0.59
	Long term practices of Ethiopians in religious tourism	0.688	4.22	0.745	
	Existence of abundant tourism resources	0.541	4.50	0.843	
	Existence of varied cultural and religious celebrations	0.444	4.28	0.789	
	Grand	0.593	4.265	0.827	

As it is clearly stated on table 11, the Exploratory Factor Analysis of the remaining 6 items has provided two - factor solutions namely: economic growth and policy related issues (Factor 1) and availability of abundant tourism resources and potentials (Factor 2) as existing opportunities of domestic tourism development in Ethiopia. Factor 1 contains two items as enabling conditions of domestic tourism development in Ethiopia namely: growth in domestic tourism business in Ethiopia and continuous economic growth in Ethiopia. Factor 2 contains four items as enabling conditions of domestic tourism development in Ethiopia namely: greater population size, long term practices of Ethiopians in religious tourism, existence of abundant tourism resources and existence of varied cultural and religious celebrations.

As clearly presented in table 11, this finding confirms that availability of abundant tourism resources and potentials including greater population size of the country (Factor 2) with grand mean and standard deviation of ($mean = 4.265, SD = 0.827$) are the most fertile grounds of domestic tourism development in Ethiopia.

The finding that was obtained from key informants also strengthens many of the above enabling conditions mentioned as fertile grounds for domestic tourism development in Ethiopia. According to interview conducted with various key informants, the most frequently mentioned favorable conditions of the sector are the existence of abundant tourism resources (including

nature, culture and history), the population size of the country and technological improvement. The remaining opportunities mentioned by few key informants are relatively improved infrastructural development and road network, relative economic growth of the country, incoming of skilled manpower into sector, expansion of media including social media and so on.

For example, one key informant (K3) has stated enabling conditions of domestic tourism development in the country as follows:

“...Regarding major opportunities of the development of the sector, the availability of comparative economic growth in the country can be one enabling atmosphere. The other is the availability of highly diversified tourism resources. In this respect we have reach religious, cultural, natural and manmade tourism assets and this is a good opportunity, as long as properly developed assets are included in this endeavor. The other good opportunity is the present government’s due attention given to this sector. And still the other is the improvement of the infrastructure, including existence of domestic flights to popular tourist destination sites. Last but not list is, the coming and availability of qualified human resource to tourism sector.”

One key informant (K1) supported the above statement and also mentioned the existence of different types of festivities and celebrities including cultural and religious festivals and inter – regional proximities as existing opportunities to develop domestic tourism in Ethiopia.

“We are endowed with abundant tourism resources. There are many religious and cultural celebrations (holiy days) that allow domestic tourism to be conducted with little cost including a variety of events. And domestic tourism by its nature can be conducted without any passport, visa, or other travel formalities which itself creates conducive atmosphere for the smooth running of this business. The other opportunity is our inter-regional proximity. Any citizen can safely travel from place to place. Indeed, there are no complicated areas as such that hinder domestic tourism trips.”

The finding of this study is even consistent with what is indicated in previous studies regarding opportunities of domestic tourism development. For instance, according to Meron (2018), Manyara (2017), Ephrem (2012) and many others, keeping other things remain constant,

availability of abundant and varied tourism resources can be considered as a golden opportunity to develop domestic tourism in a given country. According to various previous studies, Ethiopia is the owner of abundant tourism resources and diversified attraction sites (MoCT & ESTDP, 2015; Ethiopian Tourism Development Policy, 2009 and Ephrem, 2012 among many others).

The other and one crucial issue raised in this study as existing opportunities of domestic tourism development in Ethiopia was existence of greater population size in the country. This is also supported by previous studies. For instance, as Ephrem (2012) clearly mentioned, keeping other things unchanged, countries with greater population size have a bigger potential for the development of domestic tourism and in this case countries like USA and China have benefited more from this reality. For instance, China has properly used this sector as a typical tool to eradicate poverty and generate diversified job opportunities and to cover seasonality gaps of foreign tourism (CTTI, 2011).

CHAPTER FIVE: CONCLUSION AND RECOMMENDATION

5.1. Conclusion

The major purpose of this study was to explore trends, challenges and opportunities of domestic tourism development in Ethiopia. Despite its long existence and slight increment from time to time, domestic tourism in Ethiopia, is not developed and mobilized in organized manner and even it is one of unnoticed segments of the tourism sector. Domestic tourism in the country is mostly stricted to some travel purposes particularly linked to religious reasons and like. Actually according to the results of this research, religious tourism has been practiced for a long period of time in Ethiopia and even the number of participants in this segment is increasing from time to time. But the remaining travel purposes particularly adventure and activity based tourism purposes are not as such practiced types of tourism in this country.

The results of this study regarding trends of domestic tourism development generally reveal that even though there is movement of individuals and groups for different purposes and there is slight increment in rate of trips in some travel purposes particularly connected with religious reasons, the state of over all domestic tourism market is not matured in Ethiopia and not trended as well. As it is clearly stated earlier, domestic tourism is a tested sector for income generation, environmental protection and to cross- cultural understanding and the cohesion of national unity. In this regards, its contribution towards economic, environmental and socio- cultural significances are not well developed and utilized and it is still untapped sector in terms of fulfilling these issues.

Lots of factors hindering the development of domestic tourism have been identified in this study. The leading impediments are limited touring culture of Ethiopians, research gaps of the sector, poor awareness and promotion, priority problems (worshiping foreign tourism and ignoring the domestic one), inconvenient institutional structure of the sector and absence of domestic tourism development strategy at national level. The remaining obstacles are shortage of skilled man power, low level of economy and disposable income, uncoordinated approaches of stakeholders (coordination problems), problems related to legislating and regulating the sector, absence of price lists and promotional materials that are particularly designed for domestic tourists, budget

constraints of the sector, bureaucratic problems at different levels, continuous damages on nature based attraction sites and so on. These were identified challenges facing the development of domestic tourism in Ethiopia.

On the other hand, according to the finding, Ethiopia has many enabling conditions (opportunities) to develop the sector. These include: existence of abundant tourism resources (nature, history and culture) including varied cultural and religious celebrations, long term trends and practices of the citizens in religious tourism and greater population size of the country. Other identified opportunities of developing the sector include: continuous growth in domestic tourism business, existence of tourism development policy at national level, growth of economy in the country (relatively), improvement in transportation facilities including existence of domestic flights (even though it is not affordable), advancement of technology, expansion of mass medias to disseminate information have been identified as initial fertile grounds to develop this sector.

The country has lots of opportunities to develop the sector as it is clearly mentioned above. But little was done to exploit these opportunities at national level and actually there are so many challenges explained above that need to be tackled and addressed for progress to be realized in domestic tourism sector.

5.2. Recommendations

The researcher makes the following recommendations that might positively influence the level of domestic tourism development in the country. The researcher strongly believes that domestic tourism development can not be achieved by one actor but can be successful through holistic and coordinated approach i.e via coordinated and collaborated efforts of several key actors and stakeholders. From this perspective the researcher has forwarded the following recommendations typically focusing on selected key actors.

The Government

The government is among one of crucial actors of developing the sector. Clearly understanding this reality, the researcher has forwarded the following recommendations.

- First of all, it seems better to treat and give due emphasis to domestic tourism and hence confirm development and sustainability of the sector through designing ambitious strategies and tactics through out the country. Associated with this it seems better to design appropriate institutional structure that suits with domestic tourism development since it is listed as one of hindering issues of the current level of the country's domestic tourism development.
- It seems better to strengthen coordinated and collaborative efforts of stakeholders by taking first initiation in over all activities of developing the sector.
- It seems better to acknowledge and provide different types of incentives for those who give attention for domestic tourism development including tour and travel companies, hotels, academicians and other stakeholders to sustain their initiation.
- It seems better to give appropriate attention to have consistent data of domestic tourism in terms of different parameters and uniform and standardized formats of measuring and recording domestic tourism trips must be designed throughout the country.
- It seems better to launch different types of consecutive campaigns and initiatives to raise the level of awareness and promote the sector coordinated with other stakeholders.
- It seems better to intervene in the pricing rates of tourism service and product providing entities including hotels, tour and travel companies, airlines and others in order to attract domestic tourists as the existing rates are considered high and not affordable by domestic tourists. In order to do this, it seems better to design legislations, regulations and legal frameworks that help to enforce others to give due emphasis to this sector.
- It seems better to establish different types of tour clubs and associations at schools, working places and resident areas and the existing ones should be supported in appropriate way. Fruitless tasks linked to these activities must be changed. If it is possible it seems better to assign qualified medium tourism experts particularly in schools and parallel to this, working budget for this sector seems better to be allocated.
- In addition, it seems better to incorporate the issue of domestic tourism at school curriculum particularly at primary and secondary education levels. Because improving tour and travel culture of citizens is not overnight/ one-time activity. It should be done at grassroot level starting from primary and secondary schools.

- Additionally, as one mechanism of creating awareness, it seems better to expand incentive trips at different levels and any types of financial and material incentives for best performers that provided at different levels must converted in to trips.
- It seems better to avoid different types of bureaucratic problems existed at different levels particularly at lower levels including destination areas.
- Protecting, conserving, developing and expanding existing attraction sites particularly nature – based attraction sites seems among one of the prime concerns of governments at different levels.

Tourism and Hospitality Service Providing Entities (Tour Operation Companies, Travel Agents, Tour Guides, Hotels and similar establishments)

- It seems better to treat this sector like that of international tourism since it is a base for international tourism. It is a backbone of tourism economy since it can be run through out the year. It is a shock observer in times of uncertainty. So, it seems better to treat this sector even more than that of foreign tourism.
- It seems better to strengthen coordination with other stakeholders including the government, academicians and so on.
- Parallel to this, it seems better to set different types of pricing strategies and promotional tools that best suit the domestic tourism market. It seems better to launch different types of promotional campaigns and initiatives to develop the sector.

Academicians and Experts

- It seems better to play their own role in developing the sector; through identifying the existing gaps and conducting further studies and showing the exact ways of developing the sector to responsible bodies.
- It seems better to have a baseline of the sector particularly regarding timely and consistent data of domestic tourism is concerned.
- It seems better to strengthen coordination with other stakeholders including the government, tour and travel intermediaries and so on.

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Appendix I



Addis Ababa University

College of Development Studies

Center for Environment and Development Studies

Tourism Development and Management Program

Questionnaire Survey for Tourism Stakeholders

Dear Respondent,

First of all, I would like to thank you from bottom of my heart for your willingness to be part of this study. This questionnaire is designed to collect the necessary information to carry out a research on the topic *“Trends, Challenges and Opportunities of Domestic Tourism Development in Ethiopia: Stakeholders Perspective”* for the partial fulfillment of the requirements for the degree of Master of Arts in Tourism Development and Management at Addis Ababa University. The main objective of this research is to explore trends, challenges and opportunities of domestic tourism development in Ethiopia.

All information that you provide is of great importance, confidential, used only for academic purpose and will be summarized and reported in aggregate way. Hence, I respectfully request you to respond carefully for each question considering the vital importance of this study to the country under investigation and academic literature.

Finally, I kindly request you to contact me for any doubts using my mobile number and e-mail.

Name = Alemneh Mersha Mobile = 0910364879

E-mail = alexoch086@gmail.com

Thank you for your genuine answers, kind cooperation and taking your precious time to fill the questionnaire!

N.B: No need of writing your name!!!

Part I: General Profile of Respondent

Instruction: Please tick (√) your choices from the given alternatives

- 1) Sex: Male Female
- 2) Age: 18 – 27 28– 37 38 – 47 48 and more
- 3) Level of Education:
 - Certificate and below Diploma Bachelor Degree
 - Masters and above others (please specify -----)
- 4) Occupation:
 - Tour Guide (Employed or Freelancer Academician
 - Expert / official Tour operator (Investor, owner manager or employed operator
- 5) Amount of your work experience in tourism sector?
 - Less than 5 years 5 - 10 years
 - 11 – 15 years More than 15 years

Part II: Questions Related to Trends of Domestic Tourism Development in Ethiopia

Below are listed some statements which refer to the general feeling of respondents towards *trends* of domestic tourism development in Ethiopia. For each of the statements below, please indicate the extent of your **disagreement or agreement** by placing a tick in the appropriate box.

<i>To what extent do you disagree or agree with the following statements as Trends of Domestic Tourism Development in Ethiopia</i>	Strongly disagree (√)	Disagree (√)	Undecided or Neutral (√)	Agree (√)	Strongly agree (√)
	1	2	3	4	5
1) The rate of domestic trips has increased in the past 5 years in Ethiopia					
2) The economic significance of domestic tourism in Ethiopia has increased in the past 5 years					

3) The environmental significance of domestic tourism in Ethiopia has increased in the past 5 years					
4) The socio - cultural significance of domestic tourism in Ethiopia has increased in the past 5 years					
5) There was a strong government support to promote domestic tourism in Ethiopia in the past 5 years					
6) Domestic tourism investment in Ethiopia has increased in the past 5 years					
7) Domestic tourist preferences are changing from time to time in Ethiopia					
8) Incentive – based domestic trips were being experienced in Ethiopia in the last 5 years					

9) Mention if there are any more *trends* of domestic tourism development in Ethiopia.

Part III: Questions Related to Challenges of Domestic Tourism Development in Ethiopia

Here are lists which refer to the general feeling of respondents towards *challenges* of domestic tourism development in Ethiopia. For each of the statements below, please indicate the extent of your **disagreement** or **agreement** by placing a tick in the appropriate box.

<i>To what extent do you disagree or agree with the following statements as Challenges of Domestic Tourism Development in Ethiopia</i>	Strongly disagree (√)	Disagree (√)	Undecided or Neutral (√)	Agree (√)	Strongly agree (√)
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	1	2	3	4	5
1) Absence of nation-wide domestic tourism development strategy					
2) Giving priority to international tourism in expense of domestic tourism					
3) Poor and backward promotion					
4) Limited tour and travel culture amongst Ethiopians					
5) The perception of travel intermediaries (domestic tourism is not profitable)					
6) Family circumstances/ family burdens					
7) Limited product development and diversification					
8) Research gaps on domestic tourism					
9) Investments are not always linked to domestic tourists' demand					
10) Uncoordinated approach of stakeholders towards domestic tourism development					
11) Absence of a clear vision and direction towards domestic tourism development					
12) Increased cost of accommodation and transportation in Ethiopia					
13) Lack of skilled man power in this sector					
14) Safety and security issues/ problems					
15) Inconvenient institutional structure of domestic tourism					

16) Mention if there are any more *challenges* of domestic tourism development in Ethiopia.

Part V: Questions Related to Opportunities of Domestic Tourism Development in Ethiopia

Here are lists which refer to the general feeling of respondents towards *opportunities* of domestic tourism development in Ethiopia. For each of the statements below, please indicate the extent of your or **disagreement** or **agreement** by placing a tick in the appropriate box.

<i>To what extent do you disagree or agree with the following statements as Opportunities of Domestic Tourism Development in Ethiopia</i>	Strongly Disagree (√)	Disagree (√)	Undecided or Neutral (√)	Agree (√)	Strongly agree (√)
	1	2	3	4	5
1) Existence of abundant tourism resources					
2) Greater population size					
3) Long term practices of Ethiopians in religious tourism					
4) The existence of know your country clubs in schools and governmental offices					
5) Hospitality of Ethiopians					
6) Increasing facilities in transportation including the existence of domestic flights in popular tourist destinations					
7) Availability of holidays with pay					
8) Growth in domestic tourism business in Ethiopia					
9) Continuous economic growth in Ethiopia					
10) Existence of tourism development policy at national level					
11) Existence of varied cultural and religious celebrations in Ethiopia					

12) Mention if there are any more opportunities of domestic tourism development in Ethiopia.

Appendix II: Key Informant Interview Questions for Tourism officials, Experts, Academicians, Tour Operators and Tour Guides

1. How do you judge the status (trends) of domestic tourism development in Ethiopia in the past 5 years? (In terms of tour and travel culture, purpose of visit, length of stay as well as its positive impacts on economy, environment and socio – cultural aspects).
2. Do you have different strategies so far that help to develop domestic tourism in Ethiopia?
 - 2.1. If yes, what are these strategies?
 - 2.2. If No, what is the reason behind this?
3. Do you think that due emphasis is given to this sector by the government, travel intermediaries, experts, academicians and other stakeholders?
 - 3.1. If yes, then what are the indications for this?
 - 3.2. If No, then what are the fundamental reasons that make it so?
4. Who is your target market as a business? Domestic or international tourists? Why? (Only for Tour Operators and Tour Guides)
5. What type of domestic tour and travel purposes and services do you organize? (Business, religious, cultural, educational, pleasure, sport etc.) (Only for Tour Operators and Tour Guides)
6. Do you give more emphasis for domestic tourism research as one key actor and stakeholder of this sector?
 - 6.1. If yes, then what are the indications for this?
 - 6.2. If No, then what are the fundamental reasons that make it so?
7. What initiatives (short and long term measures) have been undertaken by your organization so far to develop domestic tourism in the country? (in relation to incentive travel, promotion and awareness creation, infrastructure, in terms of designing different campaigns and tactics in terms of working with travel intermediaries, academicians and other stakeholders etc.)
8. What do you think are the reasons for the underdevelopment of domestic tourism in Ethiopia?

9. What types of enabling conditions (opportunities) are existed for domestic tourism development in Ethiopia?
10. What is expected from government and other stakeholders to develop and expand domestic tourism in Ethiopia?

Appendix III: Measurement Scales

Constructs	Reliability	Items	Factor Loading
Trends of Domestic Tourism Development in Ethiopia (1= Strongly disagree, 5= Strongly agree)	$\alpha = 0.83$	- The socio-cultural significance of domestic tourism in Ethiopia has increased in the past 5 years	0.829
		- The economic significance of domestic tourism in Ethiopia has increased in the past 5 years	0.776
		- The environmental significance of domestic tourism in Ethiopia has increased in the past 5 years	0.669
	$\alpha = 0.63$	- The rate of domestic tourism trips has increased in the past 5 years in Ethiopia	0.549
		- Domestic tourism investment in Ethiopia has increased in the past 5 years	0.692
		- There was a strong government support to promote domestic tourism in Ethiopia in the past 5 years	0.607
		- Domestic tourist preferences are changing from time to time in Ethiopia	
Challenges of Domestic Tourism Development in Ethiopia (1= Strongly disagree, 5= Strongly agree)	$\alpha = 0.68$	- Poor performance in promotion	0.953
		- Limited tour and travel culture amongst Ethiopians	0.458
	$\alpha = 0.63$	- Absence of nation – wide domestic tourism development strategy	0.895
		- Giving priority to international tourism in expense of domestic tourism	0.477
		- Research gaps on domestic tourism	0.602
$\alpha = 0.59$	- Inconvenient institutional structure of domestic tourism	0.565	

		- Lack of skilled man power	0.558
		- The perception of travel intermediaries (domestic tourism is not profitable)	
		- Family circumstances/ family burdens	
		- Limited product development and diversification	
		- Investments are not always linked to domestic tourists' demand	
		- Uncoordinated approach of stakeholders towards domestic tourism development	
		- Absence of a clear vision and direction towards domestic tourism development	
		- Increased cost of accommodation and transportation in Ethiopia	
		- Safety and security issues/ problems	
Opportunities of Domestic Tourism Development in Ethiopia	$\alpha = 0.66$	- Growth in domestic tourism business in Ethiopia	0.982
		- Continuous economic growth in Ethiopia	0.623
(1= Strongly disagree, 5= Strongly agree)	$\alpha = 0.59$	- Greater population size	0.700
		- Long term practices of Ethiopians in religious tourism	0.688
		- Existence of abundant tourism resources	0.541
		- Existence of varied cultural and religious celebrations	0.444
		- The existence of know your country clubs in schools and governmental offices	
		- Hospitality of Ethiopians	
		- Increasing facilities in transportation including the existence of domestic flights in popular tourist destinations	
		- Availability of holiday with pay	

Appendix IV – Values of KMO and Bartlett’s Test on Trends, Challenges and Opportunities of Domestic Tourism Development in Ethiopia

KMO and Bartlett’s Test (Trends of Domestic Tourism Development)

Kaiser- Meyer- Olkin Measure of Sampling Adequacy		.812
Approx. Chi-Square		359.777
Bartlett’s Test of Sphericity	Df	28
	Sig.	.000

KMO and Bartlett’s Test (Challenges of Domestic Tourism Development)

Kaiser- Meyer- Olkin Measure of Sampling Adequacy		.736
Approx. Chi-Square		479.044
Bartlett’s Test of Sphericity	Df	91
	Sig.	.000

KMO and Bartlett’s Test (Opportunities of Domestic Tourism Development)

Kaiser- Meyer- Olkin Measure of Sampling Adequacy		.657
Approx. Chi-Square		370.194
Bartlett’s Test of Sphericity	Df	55
	Sig.	.000