

AN OVERVIEW OF CURRENT ETHIOPIAN TOURISM

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INTRODUCTION

Tourism is one of the most important industries and the second fastest growing sector in the world. According to (World Travel & Tourism Council, 2019) Travel & Tourism grew by 3.9% in 2018, only next to Manufacturing, which grew by 4.0%. The sector contributed \$8.8 trillion to the global economy (10.4% of global GDP) and also across the world, more than 319 million jobs were supported by the sector in 2018. This represents 10.0% of all employment, or one in every ten jobs worldwide.

According to (Africa Travel & Tourism Association, 2020) and (World Travel & Tourism Council, 2019), Africa was the second-fastest growing tourism region (next to Asia-Pacific) with 5.6% growth and contributed 8.5% (or \$194.2 billions) of the continent's gross domestic product (GDP) in 2018. According to (Jumia, 2019) and (World Tourism Organization, 2019), tourism supported 24.3 million jobs in Africa and the continent received around 5% of the estimated 1.4 billion international tourist arrivals in 2018.

(World Travel & Tourism Council, 2019) reported that, Ethiopia was the fastest growing country (growing by 48.6%) in the world in terms of Travel & Tourism GDP and the sector contributed \$7.4 billion to the Ethiopian economy in 2018, an increase of \$2.2 billion compared to that of 2017. The sector represents 9.4% of Ethiopia's total economy and supported 2.2 million jobs, or 8.3% of total employment. This shows direct contribution of travel and tourism to employment growth for Ethiopia was 41.6 %.

As indicated in the World Travel and Tourism council's latest report, Ethiopian growth in terms of Travel & Tourism was driven mainly by international visitor spending as 77% of the Travel & Tourism spending came from international travellers and 23% from domestic travel. In 2018, total number of international tourist arrivals for Ethiopia was 849,000 and the sector was primarily driven by leisure travellers, i.e., 79% of the Travel & Tourism spending was generated by leisure visitors and 21% from business travellers.

Ethiopia is known by interesting natural, cultural, Historical and Archaeological attractions. Ethiopia's tangible world heritages such as The Rock-Hewn Churches of Lalibela, The Castle of Gondar, The Stelae of Axum, The Walled City of Harrar, Tiya Stones, Lower Awash, Konso Cultural Landscape, Lower Omo Valley and The Semien Mountains National Park are among known attractions. Intangible world heritages like, Ethiopian epiphany, Gada system (an indigenous democratic socio-political system of the Oromo), Fichee-Chambalaalla (New Year festival of the Sidama people) and Commemoration feast of the finding of the True Holy Cross of Christ; and Ashenda (Ethiopian girls festival) which is under on-going nomination list are also world intangible cultural heritages of the country according to (UNESCO, 2020).

According to (Ethiopian Ministry of Culture and Tourism, 2020), World Heritage Books such as the Four Gospels /Bible, New Testament/ (14th Century), St. Paul's Epistles (15th Century), Homily of the Passion of Our Lord and Services for Passion Week (15th century), Book of Enoch (15th century), Psalterium Davids (16th Century), Letter of King Sahle Selassie of Shoa to the Queen of Britain and Letter of King Theodoros to Queen Victoria of Britain (19th Century) are among Ethiopian heritages.

In addition to its natural and cultural resources, Ethiopia has also many tourist attraction opportunities. For instance, Africa Union is located in Addis Ababa, Capital city of Ethiopia, Researches revealed that Ethiopia as origin of human being, home of Lucy, Man-made huge Renaissance DAM, and Ethiopia is among the oldest countries to accept two known religions-Christianity and Islam in the world as a result, Ethiopia is also known by its religion heritages.

Regardless of being home of all these tourist attractions and resources, Ethiopia is not benefited from its tourism sectors as expected relative to Sub-Saharan African countries like Kenya, Tanzania & South Africa (Mekonen, 2016). In this paper, we analysed performances of Ethiopia in terms of travel and tourism and forwarded recommendations to improve challenges in the sector so that the unbalanced relationship between

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contribution of the sector and tourist attraction potential of the country become balanced.

The relevance of the study is that based on the findings, the concerned body can take action to improve performances of Ethiopian tourism so that the country can get the benefit it deserves

LITERATURE REVIEW

Different literatures have been published on Ethiopian tourism. Many researchers focused on identifying challenges, strengths, weaknesses and opportunities of Ethiopian tourism sector. According to findings of different literatures, challenges such as lack of technology supported promotion; poor infrastructure and poor trained human power are serious challenges in Ethiopian tourism sector. For instance, according to (Ashenafi, 2016), (Tekabe, 2016), (Mekonen, 2016) and (Alubel, Yirdaw, & Girum, 2019), poor coordination of stockholders, poor and traditional promotion, lack of tourism market promotion through different technologies such as social media and internet, lack of physical infrastructures, misperceptions of the images of Ethiopia, shortage of trained human power in the sector are serious challenges of Ethiopian tourism. (Selemon & Alemken, 2019) also identified in their work that lack of information centres and weak promotion of tourism destinations, weak infrastructures development, and inadequate accommodation providers as the major hindering factors of development of Ethiopian tourism industry.

(Berhanu & Apar, 2020) on the other hand, considered lack of domestic tourism marketing (promotion) packages, the absence of domestic tourism development and marketing strategy and lack of attention from both government and private owned tourism business sectors identified as critical problems for Ethiopian domestic tourism. Likewise, (World Bank Group and Ministry of Culture and Tourism, 2012) identified the persistent negative image of Ethiopia and lack of comprehensive and timely tourism data are hindering Ethiopian tourism competitiveness. According to findings in (Ethiopian Development Research Institute, 2010), more tourists would have been attracted to Ethiopia, had there been a strong and coordinated promotion of the country's tourism attractions.

To develop Ethiopian tourism, different researchers have forwarded their research-based recommendations. Among these researchers, (Yenesew, 2017) , (Hirut, 2018) and (Tewodros, Derb, & Tewodros, 2019) recommended, promotion, developing professional codes of conduct, creating a platform of stakeholders for the implementation of the policy, offering training and improvement of service infrastructures to develop Ethiopian tourism. (World Bank Group and Ministry of Culture and Tourism, 2012) also recommended research-based market promotion, close collaboration of private and the broader cultural sectors and establishment of a well-functioning national tourism statistics system with strong federal-regional coordination. On the other hand, (Tesfaye, 2020) strongly recommended in his work that shifting from traditional marketing strategy to internet-based marketing (e-marketing) can help to improve development of Ethiopian tourism sector.

Similarly, (Assegid, 2019) recommended the replacement of traditional approaches such as static websites and e-mails by social media, mobile marketing, YouTube marketing, blogging and other user generated contents to promote Ethiopian tourism market products and services is crucial. In (Rakesh, 2006), development of web-based GIS technology to boost Ethiopian tourism activities was also recommended.

METHODS

To analyse current status of Ethiopian tourism, we have used different sources such as tourist arrivals data from World Bank Dataset, World Economic Forum reports, Travel & Tourism Council reports, Global Competitiveness index reports, UNESCO world heritages, Ethiopian Ministry of Culture and Tourism reports and websites, and review of different literatures.

Ethiopian tourist arrivals of last 5 years are downloaded from World Bank Datasets and compared with different Sub-Saharan African countries to see current performance of Ethiopia in the region.

Travel and tourism Competitiveness indexes of Ethiopia were also analysed from World Economic Forum reports (Travel and Tourism Competitive index reports from versions: 2009, 2011, 2013, 2015, 2017 and 2019).

Based on the analysis of the data, findings, conclusion and recommendations for future action to improve the performance of Ethiopian tourism were indicated.

ANALYSIS AND DISCUSSION

In this section, performance of Ethiopian tourism from travel and tourism competitiveness index and international tourist arrivals were analysed.

Sections 4.1 presents Analysis of Ethiopian Travel and Tourism Competitiveness Index relative to East African Countries, section 4.2 presents, Analysis of last 10 years of Ethiopian Travel and Tourism Competitiveness Index relative to 14 pillars used by World Economic Forum for ranking countries and section 4.3 presents, analysis of number of international tourists visited Ethiopia relative to other Sub-Saharan African countries.

Based on the number of international tourists visited each Sub-Saharan countries, the status of natural and cultural resources as well as UNESCO registered heritages of these countries have analysed and its implications to Ethiopian tourism sector was also presented in this section.

Figure 1: Travel and Tourism Competitiveness index of East African Countries

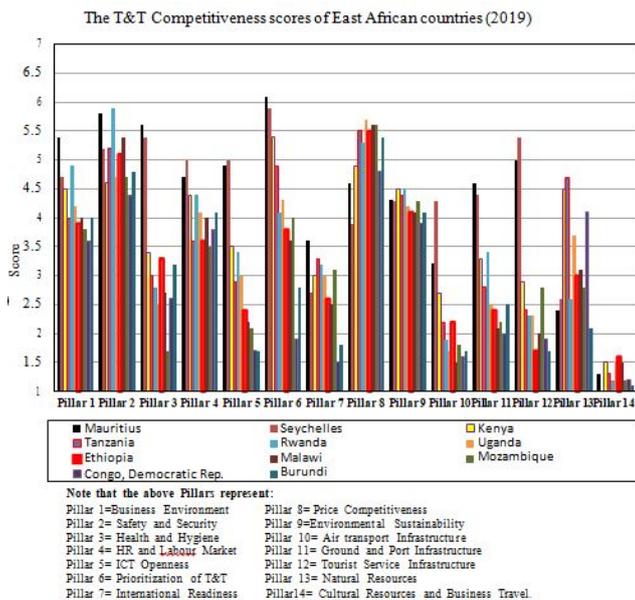


Figure 1 presents Travel and Tourism Competitiveness index of East African Countries from the latest report of World Economic Forum. (World Economic Forum, 2019) used 14 pillars to evaluate and rank 140 countries based on their travel and tourism performance globally. Here, we presented 11 East African countries travel and tourism competitiveness index to compare with that of Ethiopian performance.

As it is indicated on figure 1, performance score of all East African countries in Pillar 1 (Business Environment), pillar 2 (Safety and Security), Pillar 8 (Price Competitiveness) and Pillar 9 (Environmental Sustainability) were above average, whereas in pillar 14 (Cultural Resources and Business Travel) all East African countries scored less than average score (i.e.,3.5) . Ethiopia scored above average in Business Environment, Safety and Security, Human Resource and Labour Market, Prioritization of Travel and Tourism, Price Competitiveness and Environmental Sustainability with scores 3.9, 5.1, 3.6, 3.8 & 5.5, and ranked 9th, 6th, 9th, 8th, 3rd and 8th respectively relative to 11 East African travel and tourism competitiveness scores. In rest of the pillars, i.e., Health and Hygiene, ICT Readiness, International Openness, Air Transport Infrastructure, Ground & Port transport Infrastructure, Tourist Service Infrastructure, Natural Resources and Cultural Resources and Business Travel, Ethiopia scored below average. In Cultural Resources and Business Travel, regardless of scoring below average, Ethiopia appeared at 1st rank from the region as all East African countries scored below or equal to 1.5.

Analysis Ethiopian Travel and Tourism Competitiveness Index

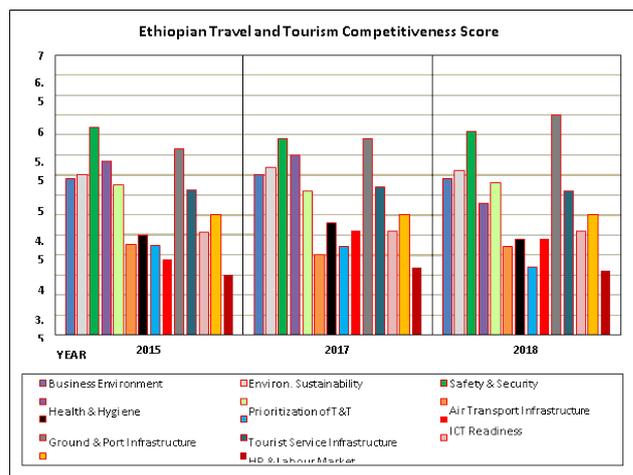
Figure 2: Travel and Tourism Competitiveness Index of Ethiopia (2009, 2011 & 2013)



As shown on Figure 2 above, Ethiopia scored average or above average in Policy Rules and Regulations, Environmental Sustainability, Safety and Security, Prioritization of Travel and Tourism, Price Competitiveness, Human Capital, Affinity for Travel and Tourism and Natural Resources continuously in Travel and Tourism Competitive Index reports 2009, 2011 & 2013. However, in the rest of 6 pillars, Ethiopia scored poor performances and worst score was recorded in Health and Hygiene (score of 1.02 in 2009 report and score of 1.03 in 2011 report). However, in 2013, Ethiopia improved the score of Health and Hygiene to 2.44 which was still below average score.

In ICT infrastructure, Tourist Service Infrastructure and Cultural Resources, Ethiopia continuously scored poor records regardless of insignificant increase or decrease in each pillar. In pillars such as Air, Ground and Port Transportation Infrastructures, even though there were improvements in performance scores, still the scores were below the average score according to (World Economic Forum, 2009), (World Economic Forum, 2011) and (World Economic Forum, 2013) reports.

Figure 3: Travel and Tourism Competitiveness Index of Ethiopia (2015, 2017 & 2019)



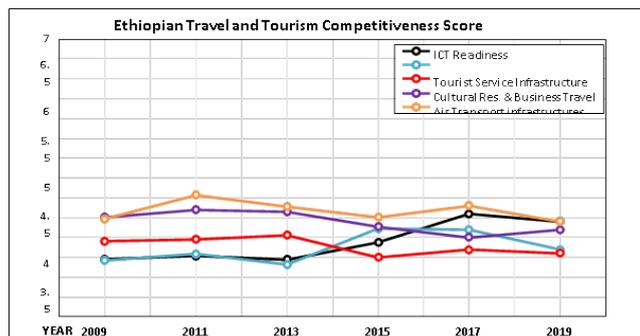
From figure 3 above, Ethiopia scored average or above average in Business environment, Environmental sustainability, Safety and Security, Health and Hygiene, Prioritization of Travel and Tourism, Price Competitiveness and Human resource and Labour Markets. Ethiopia recorded poor records in ICT Readiness, Transport & Tourist Service infrastructures, and Cultural Resources and Business Travel.

Regardless of poor record in pillars Cultural Resources and Business Travel of Ethiopia, only 3 countries, South Africa

(scored 3.2 and ranked 23rd), Nigeria (scored 1.8 and ranked 60th), and Mali (scored 1.6 and ranked 70th), ranked above Ethiopia (scored 1.7 and ranked 71th), from Sub-Saharan African countries according to Travel and Tourism Competitiveness index report 2019.

Figure 2 and 3 above, Ethiopia’s poor performance were recorded in ICT Readiness, Tourist Service Infrastructure, Cultural resources and Business Travel, Air Transport infrastructure, and Ground and Port in last 10 years. The increase/decrease score of each 5 pillars are represented on figure 5 below.

Figure 5: Ethiopian Travel and Tourism Competitive index of selected pillars



The performance score of Ethiopia in 5 pillars from 2009 - 2019 is shown on figure 5 above. The graphs of each pillars show that Ethiopia was constantly recorded poor performance and, in each pillar, there was slight decrease of score for last ten years.

In Tourist service infrastructure, the country recorded poor score in 2009 (1.42) and improved its performance to 2.2 in 2017 but in 2019, Ethiopia scored the worst record 1.7 and ranked 138th out of 140 countries (only above Liberia and Burundi with score 1.7 each) in Tourist service infrastructure in 2019.

In ICT readiness as shown on figure 5, increase of score in ICT readiness was recorded from 2013 to 2017 but slight decrease from 2017 to 2019. Table 1 & 2 below show that the key indicators, scores and ranks (2017 & 2019) of ICT readiness and Service infrastructures respectively.

Table 1: Key indicators of ICT Readiness

Key Indicators	2017 Report		2019 Report	
	Score	Rank/136	Score	Rank/140
ICT use for biz-to-biz transactions	3.6	129	3.4	129
Internet use for biz-to-consumer transactions	3.7	112	3.2	130

Internet users % pop.	11.6	126	18.6	124
Fixed-broadband Internet subscriptions /100 pop.	0.5	116	0.1	136
Mobile-cellular telephone subscriptions /100 pop.	42.8	134	37.7	140
Mobile-broadband subscriptions /100 pop.	3.7	134	14.1	134
Mobile network coverage % pop.	95.0	108	85.0	131
quality of electricity supply	3.4	103	3.2	117

Source: Adapted from World Economic Forum reports: 2017 & 2019)

According to travel and tourism competitiveness index report 2017, Ethiopia scored 2.6 in ICT Readiness pillar and globally ranked 125th out 136 countries. As represented on table 1 above, if we compare 2017 and 2019 scores of key indicators of ICT readiness, except in ‘Internet users’ indicator, score of all key indicators decreased from 2017 to 2019.

Table 2: Key indicators of Tourist Service Infrastructure

Key Indicators	2017 report		2019 report	
	Score	Rank/136	Score	Rank/140
Hotel rooms number/100 population	0.0	130	0.0	137
Quality of tourism infrastructure	3.9	106	3.8	112
Presence of major car rental companies	2	113	0	136
ATM number/	0.5	135	0.8	139

 100,000
 adult
 population

Source: Adapted from World Economic Forum reports: 2017 & 2019)

In Tourist Service Infrastructure, Ethiopia scored 2.2 and ranked 129th out of 136 countries in 2017 and scored 1.7 and ranked 138th out of 140 countries in 2019. As indicated on table 2 above, the score and rank of key indicators of Tourist Service Infrastructure in 2019 were decreased relative to that of 2017.

On other hand, according to (World Economic Forum, 2017) and (World Economic Forum, 2019) reports, regardless of scoring below average and decreasing its performance score from 2009 (score 2.47) to 2017 (score 2.0), Ethiopia improved its performance score in Air transport infrastructure in last two years by improving its 2017 score 2.0 to 2.2 in 2019. However, Ethiopia recorded poor performance in Ground and Port Infrastructure (reduced its 2017 performance score 2.8 to 2.4 in 2019).

Table 3: Overall Global and Regional Ranks of Ethiopian Tourism

Report Version (Year)	Overall score	Overall Global Rank	Total Number of Countries	Overall Regional Rank
2009	3.15	123	133	31
2011	3.26	122	139	18
2013	3.29	120	140	17
2015	3.03	118	141	17
2017	3.1	116	136	15
2019	3.0	122	140	18

Source: Adapted from World Economic Forum`

From table 3 above, the overall performances of Ethiopia were less than average score (3.5) and poorly ranked globally as well as regionally according to World Economic Forum reports. According to 2019 report, Ethiopia scored only 3.0 out of 7 which was less than average score. By this score, Ethiopia was ranked 122th out of 140 countries and ranked 18th from the region.

Analysis of Ethiopian Tourism from International Tourist Arrivals

International tourists visited countries directly contribute to economic GDP and support unemployment of the countries. The number of international tourists visited Ethiopia and other Sub-Saharan African countries last five years were given in the table 4 below.

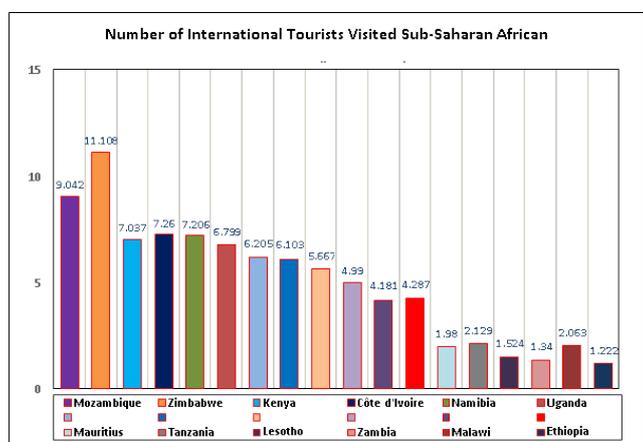
Table 4: Number of International Tourist Arrivals of Some Sub-Saharan African Countries

No	Sub-Saharan Count.	2014	2015	2016	2017	2018
1	South Africa	954900 0	890400 0	100440 00	102850 00	104720 00
2	Mozambique	1661000	155200 0	163900 0	144700 0	274300 0
3	Zimbabwe	188000 0	205700 0	2168000	242300 0	258000 0
4	Kenya	1261000	1114000	126800 0	136400 0	202520 6
5	Côte d'Ivoire	471000	1441000	158300 0	180000 0	196500 0
6	Namibia	132000 0	138800 0	146900 0	149900 0	153024 6
7	Uganda	126600 0	130300 0	132300 0	140200 0	150500 0
8	Mauritius	103800 0	1151000	127500 0	134200 0	139900 0
9	Tanzania	1113000	110400 0	123300 0	127500 0	137800 0
10	Lesotho	107900 0	108200 0	119600 0	1137000	1173000
11	Zambia	947000	932000	956000	108300 0	107200 0
12	Malawi	819000	805000	849000	837000	871000
13	Ethiopia	770000	864000	871000	933000	849000
14	Togo	282000	273000	338000	514000	573000
15	Gambia	156000	449000	450000	522000	552000
16	Seychelles	233000	276000	303000	350000	362000
17	Benin	242000	255000	267000	281000	295000
18	Angola	595000	592000	397000	261000	218000
19	Dem. Rep. of the Congo	273000	363000	224000	206,000	156000

Source: Adapted from World Bank Dataset

As it can be seen from above table, South Africa, Mozambique, Zimbabwe, Kenya, Côte d'Ivoire, Namibia, Uganda, Mauritius, Tanzania and Lesotho were top 10 Sub-Saharan African countries that accepted international tourists last 5 years. Relative to these African countries, Ethiopia accepted less than one million international tourists each year in last five years. As indicated on table 4 above, Ethiopia was among Sub-Saharan African countries that were less benefited from international tourists as it accepted a smaller number of visitors relative to African countries like South Africa and other top ranked countries in the region. As we can see from the table, except in four countries, Zambia, Ethiopia, Angola and Democratic Republic of Congo, the number of international tourists visited all Sub-Saharan countries increased from 2017 to 2018.

Figure 6: Number of Tourists Visited Sub-Saharan African Countries last 5 years (2014-2018)



The country that accepted largest number of tourists in last five years (from 2014-2018) was South Africa (49.254 Million tourists). (Note that as the number of tourists visited South Africa was incomparable to other Sub-Saharan African countries, we excluded from figure 6 above). As shown on figure 6, total number of tourists visited Ethiopia last 5 years (2014-2018) was 4.287 million tourists. This number was less than half of the number of tourists accepted by Mozambique and Zimbabwe, and 1/12th of that of South Africa.

Figure 7: Comparison of Tourist arrivals in Ethiopia, Kenya and Tanzania (2014-2018)



Figure 7 shows that international tourist arrivals in 4 East African countries - Ethiopia, Kenya, Tanzania and Uganda. As indicated on the above figure, the number of International tourists visited Tanzania and Uganda increased uniformly from 2014 to 2018. However, According to (Ministry of Tourism and

Wild Life - Kenya, 2018) by accepting about 2.025 million (48% increase relative to that of 2017) international tourists, Kenya became the leader among the four countries. Similarly, number of international tourists visited Tanzania was increased to 1.378 million in 2018 (8% increase relative to that of 2017). On other hand, Ethiopia accepted the smallest number of tourists relative to the four East African countries each year. In 2018, Ethiopia accepted 849,000 international tourists (8% decrease relative to that of 2017). The number of international tourists visited Ethiopia each year was less than one million regardless of having great tourism opportunities such as large number of UNESCO registered heritages than many African countries as indicated on table 5 below.

Table 5: Some Sub-Saharan African Countries and Number of UNESCO Registered Heritages

Rank	Sub-Saharan African Countries	Number of UNESCO registered Heritages
1	South Africa	10
2	Ethiopia	9
3	Kenya	7
4	United Republic of Tanzania	7
5	Senegal	7
6	Zimbabwe	5
7	Democratic Republic of the Congo	5
8	Côte d'Ivoire	4
9	Mali	4

Source: (World Heritage List, 2020), (UNESCO, 2020)

CONCLUSION AND RECOMMENDATION

Analysis of this paper has shown that, Ethiopian travel and tourism performance relative to East African countries was average. Ethiopia was better than all East African countries in its cultural resources and business travel regardless of recording poor score as other East African countries recorded the worst score in their cultural resources and business travel score.

The overall global rank and score of Ethiopia in terms of travel and tourism in last 10 years was poor and needs immediate action to improve the performance of the country. In last 10 years, Ethiopia improved its performance to average in travel and travel pillars such as: Safety and Security, Health and Hygiene, Price Competitiveness, Business Environment, Environmental Sustainability, Prioritization of Travel and Travel and Human resource and Labour Market. On the other hand,

Performance of Ethiopia in travel and tourism pillars like Air, Ground and Port infrastructures, ICT readiness, International Openness, Natural & Cultural Resources and Business travel, Ethiopia's performance in travel and tourism was poor in last 10 years. In natural resources, Ethiopia's performance score was improved from 2009 to 2013 whereas from 2015 to 2018, the performance score of the country was decreased.

Ethiopia accepted only 4.287 million tourists in last 5 years. Which was small number relative to its tourism potential in Sub-Saharan African region. As many countries in the region accepted larger number of international tourists regardless of their poor natural and cultural resources, if Ethiopia promotes its resources and tourism potentials to the world, the country can accept more international visitors.

We recommend the concerned body to work on improving the ICT, Transport and service infrastructures; provide training for tourism industry service providers and changing traditional tourism marketing promotion approaches to internet-based (using Social media and Websites) approaches so that it becomes easier to reach visitors around the world and also it changes misperceptions about images of Ethiopia.

As a future work, we recommend researchers to assess Ethiopian tourism market promotion styles so that the traditional promotion approaches can be replaced by appropriate promotion techniques to tell the international community about tourist destinations and potential resources in Ethiopia.

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