

Factors Affecting Tourism Competitiveness of Ethiopia: International Tourist Destination Choice Perspective

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ABSTRACT

This research examines the factors that affect international tourists' destination choice to Ethiopia. Descriptive research design was employed with quantitative and qualitative approach. Survey questionnaire, interview and secondary data collection instruments were used to achieve the intended objectives. 154 international tourists' were selected accidentally for questionnaire survey response while 6 national tour operation managers were purposefully selected and employed for interview participation. The quantitative data was organized and presented by using SPSS version 21 while, qualitative data was analyzed through narration and content analysis and used to triangulate and substantiate the study. The finding indicates that Ethiopia has immense natural, cultural and historical tourism resources potential that can create great opportunity for tourism development. However, the destination choice is affected by different push and pulls factors and source of information to access tourists to destination. There is fragmentation of the sector and under development of tourism products and service quality of the country that create negative image of destination. The level of general infrastructures and tourist infrastructure are also found at low stage. In order to become competent destination at international tourism market, tourism product development, destination marketing and service quality improvement is highly required.

Keywords: Ethiopia; Destination competitiveness; Factors affecting; Destination choice; Pull & push factors; Source of information

INTRODUCTION

The strength of the destination competitiveness is mainly linked with the quality of destination and can strongly affect destination choice [1]. Evaluation of factors affecting destination competitiveness for tourists' choice, therefore, has become important and fundamental to ensure the benefit of tourism for national economy. It has an instrumental role to support the development of tourism industry through taking action [2]. Hence, the aim of conducting this study is to know the current reality present at destinations that has an instrumental role to support the development of tourism industry in Ethiopia. The ministry of culture and tourism of Ethiopia can use the finding to take action for finding stated in the finding: (i) to prepare and provide some guidelines, (ii) to set and implement public policies (iii) to formulate and implement strategic destination plan, (iv) to monitor the efficiency and effectiveness of the actions taken, (v) to prioritize actions to be taken, (vi) to allocate the resources that will benefit the sector and to support service for Medium, Micro and Small size enterprises.

With regard to Studies on tourist destination competitiveness, there is no consensus that shares the same conceptualization, methodological approach or ways of evaluation. There are different models of studies and international experiences presented by different authors [2]. Gooroochurn and Sugiyarto have developed a model for the evaluation of the competitiveness of tourist destinations with specific elements namely, prices, economic openness, technological developments, structure, human development in tourism, social development, the environment and human resources [3].

Nicolau and Mas identified 12 destination attributes that affect the tourists' choice to travel destination such as surface area, price, natural attributes, infrastructure, accessibility, reputation of the destination, restrictions of navigation, time of journey, entry prices, hotel size and services, parking area and shopping that affect the tourist choice [4].

Crouch and Ritchie have founded a conceptual model of competitiveness for destinations, based on 4 aspects such as

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qualification factors (or situational conditions), management of the destination, attractions and key resources and support factors and resources [5].

WTTCI, specified 14 major indicators of tourism destination competitiveness namely, natural resources, price competitiveness in travel and tourism, environmental sustainability, cultural resources, safety and security, air transport infrastructure, affinity for tourism/international openness, health and hygiene, policy regulations/business environment, prioritization of travel and tourism, ground transport infrastructure, human resources, tourism infrastructure and ICT infrastructure [6].

Kozak and Remington have observed and formulated that the competitiveness of tourist destinations is based on a combination of two fundamental factors such as primary factors (climate, ecology, culture, architectural heritage), and specific factors of the tourist sector (hotels, transport means and entertainment [7].

On the other hand, Echtner and Brent, has looked the major characteristics used to measure destination image specifically, landscape and natural sites, the level of prices, the climate, the sports facilities or activities architecture and buildings, historical monuments, museums, beaches, shopping, accommodation, exhibitions held in cities, festivals [8].

The World Economic Forum, has developed competitiveness index models based on thirteen key elements namely, public policies and regulations, environmental legislation, safety, health and hygiene, priority given to the tourism sector, air transport infrastructure, ground transport infrastructure, tourism infrastructure, communications infrastructure, prices in the tourism sector, human resources, national perception of tourism; and (natural and cultural resources) [9].

From these complex diversities of competitiveness evaluation models, it is clear that the choice of the variables for destination competitiveness evaluation depends on the geographic base (regions or countries) and the purpose of study. The best model of competitiveness is the use of multidimensional phenomenon and its measurement depends on the variables chosen, in addition to the evaluation criteria and the unit of analysis [9]. Authors of this study reached to use The World Economic Forum competitiveness index model since it comprises diverse variables and gives comprehensive understanding of factors affecting destination competitiveness, and the geographically, the study aims to assess at country level.

Therefore, the general objective of this study is to evaluate factors affecting international tourist's destination choice mainly from tourists' perspective to get comprehensive understanding of destination competitiveness. The study assesses push factors (personal characteristics of tourists), sources of information and pull factors (destination image components namely, natural resource and environment, cultural and historical resource, general infrastructure, tourist infrastructure in focus, political and local community aspect and tour guiding service.) Finally the finding is summarized in to group mean difference of destination components. Specific the objectives of the study are therefore:

- To evaluate the sources of information that tourists are used to select Ethiopia as a tourism destination.

- To assess pull factors affecting international tourist destination choice of Ethiopia.
- To assess out push factors affecting international tourist destination choice of Ethiopia.
- To forward possible recommendation for concerned body to take possible actions.

Review of related literature

The definition and explanation of destination have been vague. There are different terminologies of "destination" defined by different authors. Horner and Swarbrooke termed tourism destination as a place, where the business traveler trip will be held and comprised of all tangible and intangible tourism products and services [10]. Similarly, Fabricius describes tourism destination as a physical place in which tourists spend and stay at least one night. He added as it includes the tourism resources and tourist support service within one at place [11]. These comprise attraction, price, image, human resource, amenity and accessibility that makes the tourist intends to travel to the destination. On the other hand, Buhalis d broadly observed tourist destination as it is combination of all tourism products, service and ultimately, experiences and other intangible items that promote the destination image and influence its market competitiveness [12].

Goeldner and Ritchie assessed determinant factors of tourist flow from demand and supply perspective. They viewed the importance of origin of tourists' country as it determines international tourist flows [13]. According to their outlook, tourist motivation is affected by internal psychological influences and related to needs and personal goals. On the other hand, they observed importance of destination supply factors in influencing the arrival, stay and expenditure of international or domestic tourists. Adomaitiene and Seyidov also saw supply factors as pull factors of a tourist destination and are combination of facilities and services made up of a number of traits that all contribute to the attractiveness of destination choice [14]. Vengesai added that destination attractions include all form of visitor attractions that pull tourists to choose a destination. Destinations attractions are primary determinants. Hence, there could not be special interest and travel to particular place tourism without destination attributes i.e. destination attractiveness has a direct impact on destination choice [15].

The international tourists travel motivation can be influenced by hospitality of the local people, quality of accommodation and transportation facilities, good weather, cleanness of a country, political stabilities and safe place to stay [16]. Political risk determines the international tourist demand. In other words, political unrest of the destination affects the destination choice of international tourist [17,18]. Moreover, infrastructure has the wide range of services and facilities which support the visitors' to travel and stay at the destination [11]. It is highly dependent on the availabilities and quality of infrastructures such as accommodation facilities (hotels, lodges, hostels, and apartments), gastronomy facilities (Restaurants, bars, café) and transportation to destination and within destination. The infrastructure development of the destination is important to tourists to choose and staying at destination, and has positive impact for tourist flow [19]. The image of the destination that comprises of uniqueness, scenes,

environmental quality, safety, tourist service level and friendliness of the local residence are decisive factors [11].

Economic, social, political, regulation of the airline industry, entry visas and permits, route connections, hubs, landing slots, airport capacities, and competition among carriers can also determine accessibility. Based on demand side, this can be measured by the relative difference in the time, cost, distance, or effort required to access different destinations [20].

Price is an important aspect of the destination's competitiveness. It is related with the cost of accommodations and transportation to destination and within the destination, cost of tour packages and charge for attraction [10]. The tourist perception and expectation on price is related with the travel motivation of tourists. Similarly, the increasing price of transportation cost determines the international tourists [18]. The price difference between the tourist origin and destination can determine the tourist flow. Likewise, Jannit and Aeka suggest that the price of the tourism service and the affordability of hospitality service affect the travel decision of the international tourist to destination. Exchange rate also highly determines the international tourist demand and decision to travel [16-18]. Therefore, transportation, accommodation and other tourism services price is the decisive factor for destination selection of tourists. When the price increase, the tourist's length of stay will decrease, the spending powers of tourist become restricted; and even the travel decision change to other destination [16].

Um and Crompton also recognized three core stages in a tourism destination choice; 1st stage is the awareness set stage; 2nd evoke set stage which is disposing of some of those destinations to form a late consideration, and last stagedestination chosen from those in the late consideration set stage [21]. Hence, Promotion is very crucial instrument in tourist destination selection. Countries having tremendous tourism resources should focus on promotional activities. According to Fabricius, destination needs to be promoted to the target customers or tourists either directly to the consumer or via intermediaries (travel and tour operators) by using a range of promotional methods. Fabricius further particularizes

the destination information to be distributed through the most appropriate channel of distribution to the tourists such as by brochure; travel agent and tour operation [11]. The international tourists are influenced by promotional media such as newspaper and travel supplements, magazines, television, travel program and guidebooks. They are filled with information that conveys a positive or a negative message about a destination [22]. This needs financing for promotional activities. However, limited budget for promotion hinders the country to attract tourists from different corners of the world [23]. Generally, destination image is the sum of beliefs, ideas and impression that a person has on destination [24]. But, the fact that most country images are stereotype, extreme simplifications of the reality that are not necessarily accurate as resulted from biased media publicity. The information might depend on exceptional rather than the real life of facts, pattern and impression [25].

RESEARCH METHODOLOGY

Description of study area

The geographical Position of Ethiopia is in the Horn of Africa between the Equator and Tropic of Cancer, at the 3°N and 15°N Latitude and 33°E and 48°E Longitude. The area covers 1.2 million km² [26]. It shares boundaries with Eritrea in the north, Djibouti and Somalia in the east, Sudan and South Sudan in the west, and Kenya in the south (Figure 1). The population of Ethiopia is estimated 115,000,000 with density of 95 persons per square kilometers. It is the second-most populous country in Africa with dominantly agricultural economic activity [27]. The country is rich in astonishing tourism resources (Table 1 to 8). The country has 5 types of agro-ecological climatic zones namely, Wurch/frost, Daga/cold, wina-daga/temperate, Kola/hot, Baraha/desert with 13 months of [28].

Research design and materials

Methodologically, there is no consensus among researchers to use the same evaluation method of tourism destination competitiveness. It can be evaluated either quantitatively or qualitatively. For instance,



Figure 1: Top tourist Destination of Ethiopia Source: www.ethiopia.travel

Table 1: Respondents' profile.

Variables where (n=154)	Response categories	Frequencies	Percentage
Gender	Male	84	54.5
	Female	70	45.5
Age	20-30	35	22.7
	31-40	34	22.1
	41-50	26	16.9
	51-60	20	13.0
	Above 60 years	39	25.3
Marital status	Single	60	39.0
	Marriage	66	42.9
	Divorced	13	8.4
	Widowed	4	2.6
	Cohabitation	11	7.1
Origin	Europe	108	70.1
	Americas	21	13.6
	Asia and pacific	18	11.7
	Africa	5	3.2
	Australia (Oceania)	2	1.3
Educational level	University degree or above	108	70.1
	College graduate	31	20.1
	Secondary school level	13	8.4
	Primary school and below	2	1.3
Employment status	Employed	87	56.5
	Retired	36	23.4
	Un-employed	13	8.4
	Self-employed	18	11.7
Travel experience	For first time	123	79.9
	Twice or more	31	20.1
Length of stay in night	Up to 7	38	24.7
	8 to 12	55	35.7
	13 to 15	24	15.6
	Above 15	37	24

Source: Field Survey, 2018

Table 2: Major source of information for tourists.

Source of information	Frequency	%
Past travel experience	17	11
Trade fair (exhibition)	3	1.9
Internet	47	30.5
Television	8	5.2
Books	12	7.8
Documentary	4	2.6
National geography channel	1	0.6
Academic articles	3	1.9
Word of mouth/friends and relatives recommendation	35	22.7
Travel guides and brochures	14	9.1
Tour agency	10	6.5
Total	154	100

Source: Field Survey, 2018

Enright and Newton have formulated a quantitative model for the measuring of competitiveness based on the identification of

significant factors which affect the competitiveness of the attractions and the businesses related to the segment of destinations [2,29]. However, The World Economic Forum studied on competitiveness based on secondary data from various international organisms and a survey among leaders and executives present at the forum [6]. Due to strength of mixed method of research to overcome limitation of one method through strength of another method and to get better conclusion, researchers of this study used mixed (qualitative and quantitative) method with descriptive and explanatory design. According to Crano et al. descriptive research design is used to describe existing phenomenon under study. On the other hand, explanatory design is typically used to explain and interpret quantitative results by collecting and analyzing qualitative data. Explanatory design is also useful to examine results in detail when unexpected results arise from a quantitative study [30]. Hence, to make the study strong, descriptive and explanatory design was employed. Survey questionnaire, interview and secondary data collection instruments were used since they are appropriate for descriptive and explanatory research design to achieve the intended objectives.

Both Accidental and purposive sampling techniques are applied. As a result, the data were collected through using questionnaire survey design from 154 international tourists using accidental sampling technique; close-ended and open-ended questions were used. The data was mostly collected at Addis Ababa in 2018, where independent star rated hotels and international franchise hotels are available to get international tourists for data collection. Furthermore, 6 national tour operation managers were purposively used for in depth expert interview to collect data. Besides, secondary data source relevant to the topic under study were used.

The process of data analysis and drawing of conclusion was based on empirical evidence. Questionnaire survey data were analyzed through using SPSS version 21 to analyze survey data. Frequency, percentage and mean are model analysis methods used. 5 point Likert Scale is used to evaluate the degree of destination attribute where 1=completely unimportant, 2=A little important, 3=neutral 4=important and 5=very important. The mean for each of the destination components is calculated from the importance of specific destination attributes in choosing Ethiopia to travel being ideal mean value is 3. Qualitative data obtained using key

Table 3: Natural resource and environment.

Components of attributes	Frequency (%)					Mean
	Completely unimportant	A little important	Neutral	Important	Very important	
National parks and wildlife sanctuaries	1.9	5.2	22.1	37.7	33.1	4.01
Beautiful natural scenery and landscape	0.0	0.0	5.8	40.3	53.9	4.48
Nature based activities such as trekking, bird watching, bush walking	4.5	10.4	26.0	35.1	24.0	3.64
A Variety of Flora and Fauna(e.g. Animals ,Birds, Forests)	0.0	3.9	22.1	51.9	22.1	3.92
Pleasant weather of Ethiopia	0.6	3.2	11.0	50.0	34.4	4.15
Unpolluted nature of Ethiopia	1.9	12.3	24.7	33.8	27.3	3.72
Group mean						3.99

Source: Field Survey, 2018

Table 4: Cultural and historical resource.

Components of attributes	Frequency (%)					Mean
	Completely unimportant	A little important	Neutral	Important	Very important	
Cultural events and festivals	1.9	5.8	13.6	51.9	26.6	3.95
Variety of local cuisine	2.6	13.0	34.4	35.7	14.3	3.46
Historical sites	0.0	1.3	1.9	37.7	59.1	4.55
Museums and art galleries	1.3	12.3	31.2	37.7	17.5	3.58
Cultural heritages	0.0	2.6	5.2	40.3	51.9	4.42
Ethnic group with different life styles	0.6	1.3	10.4	48.7	39.0	4.24
Diversity of culture	0.0	3.2	13.0	51.3	32.5	4.13
Group mean						4.05

Source: Field Survey, 2018

Table 5: Tourist infrastructure in focus.

Components of attributes	Frequency (%)					Mean
	Completely unimportant	A little important	Neutral	Important	Very important	
Recreation facilities (e.g. Leisure facilities, Horse Riding, Mountain biking, Beach)	13.0	29.2	34.4	19.5	3.9	2.72
Night life and entertainment activities (e.g. bars, disco, fun, dancing)	26.6	29.2	27.9	14.3	1.9	2.36
Airport efficiency and quality	1.9	7.1	16.2	48.7	26.0	3.90
Amusement/Theme parks	24.0	24.7	34.4	11.7	5.2	2.49
Easy to obtaining VISA at Ethiopia Embassy	3.9	7.1	11.0	39.0	39.0	4.02
water based activity (e.g. Swimming, Boating, Fishing, Rafting)	15.6	25.3	34.4	16.2	8.4	2.77
Availability of health and spa tourism	21.4	22.1	31.2	20.1	5.2	2.66
Adventure activities (e.g. Sky diving, Bungee jumping, Trekking)	18.8	24.0	31.8	18.2	7.1	2.71
Accommodation variety and quality (hotel, resort, apartment)	1.3	3.9	14.9	50.6	29.2	4.03
Food and beverage facilities and service	1.3	5.2	9.1	60.4	24.0	4.01
Easily access of shopping facility	7.8	11.0	31.8	38.3	11.0	3.34
Tour guiding services						4.01
Group mean						3.25

Source: Field Survey, 2018

Table 6: General infrastructure.

Components of attributes	Frequency (%)					Mean
	Completely unimportant	A little important	Neutral	Important	Very important	
Local transportation efficiency and quality	3.2	7.8	22.1	53.2	13.6	3.66
Quality of road and highway	1.3	14.3	27.9	44.2	12.3	3.52
Medical (Health) facilities and services	6.5	14.9	37.0	31.8	9.7	3.23
ICT infrastructure for tourists	6	7.8	11.0	46.1	34.4	4.06
Commercial infrastructure	5.8	19.5	39.6	29.2	5.8	3.10
Water supply	1.9	3.9	18.2	50.6	24.7	3.93
Electricity supply	1.3	1.9	13.6	41.6	41.6	4.20
Group mean						3.67

Source: Field Survey, 2018

Table 7: Political and local community aspect.

Components of attributes t	Frequency (%)					Mean
	Completely unimportant	A little important	Neutral	Important	Very important	
Safety and security of tourists	0.6	3.9	12.3	51.3	31.8	4.10
'fit' between destination products of Ethiopia and tourist preference	0.6	5.8	29.2	44.2	20.1	3.77
Prioritization of Tourism and Hospitality sector	1.3	9.7	35.1	40.9	13.0	3.55
Hospitability of residents towards tourists	0.6	1.3	8.4	58.4	31.2	4.18
Political stability	0.6	3.9	10.4	40.9	44.2	4.24
Group mean						3.96

Source: Field survey, 2018

Table 8: Tour guiding service.

Components of attributes	Frequency (%)					Mean
	Completely unimportant	A little important	Neutral	Important	Very important	
Interpersonal and communication skill	1.3	1.9	20.1	53.9	22.7	3.93
Service quality	0.0	3.2	5.2	57.1	34.4	4.21
Knowledge of tourism and hospitality	1.3	6.5	28.6	44.8	18.8	3.72
Meeting tourists' needs	0.0	5.8	16.9	50.0	27.3	3.95
Ethical business practices	0.0	6.5	18.8	49.4	25.3	3.92
Image building (reputation) of country	0.0	1.3	18.2	35.1	45.5	4.25
Group mean						4.00

Source: Field Survey, 2018

Table 9: Group mean difference of destination components.

Destination components	Group Mean
Natural Resource and Environments	4.01
Cultural and Historical Resource	4.05
Tourist Infrastructures	3.25
General infrastructure	3.67
Political and local community aspects	3.96
Tour guiding service	4.00
Grand mean	3.82

Table 10: Reliability analysis of variables.

No	Variables/destination attributes/components	No. of items	Chronbach's Alpha(α)
1	Natural Resource and Environments	6	.825
2	Cultural and Historical Resource	7	.829
3	Tourist Infrastructures	11	.738
4	General Infrastructures	7	.732
5	Political and local community aspects	5	.809
6	Tour guiding service	6	.815

informant interviews and secondary data sources such as journal articles, reports, proclamations and policy documents relevant to the topic under study were reviewed and used to triangulate the discussion and rich into conclusion. According to Morgan, Greene C. and Graham triangulation is used to confirmation and cross-validation [31].

RESULTS AND DISCUSSION

The discussion of this research focuses on factors affecting international tourists' destination choice to get comprehensive understanding. The study assesses pull factors (destination image components), push factors (personal characteristics) and sources

of information. Pull factors include natural tourism resource profile, cultural and historical tourism resources profile, tourism infrastructure, general infrastructure, political aspect, level of service rendered to tourists, safety and security of the country for tourists and hospitality of the local community towards tourists. Push factor include age, gender, educational level, marital status, purpose of visit, origin of residence, whereas, source of information include information from past experience, information from promotion, information from other sources and trade and diplomatic relation [10,27,32,33].

Push factors (Tourists profile)

The Push factors (respondents' profile) including origin of the tourists, gender, age, marital status, educational level, and employment status and travel experience of foreign tourist to Ethiopia and length of stay can affect international tourism destination choice. The finding is discussed below.

As depicted (Table 1) above, 54.5% of the respondents are males and 45.5% are females showing slight difference of sex mix international tourist participation to visit Ethiopia. The gender distribution agrees with Swarbrooke (1999) observation that males and females are nearly equally represented in cultural sites. This also works for Ethiopia which has better-development in cultural sites than nature [34,35].

Regarding to the age group distribution of the respondents', majority of age groups (25.3%) is above 60 years (Table 1). This has a great advantage to Ethiopia since old people are demanding to travel in the vacation and pension time to make it relaxation and rest, to alleviate stress in the cultural and natural tourist destination. Moreover, old people have not much career to their families; hence they stay for long time at destinations they travel and expend much money to tourism activities during their stay than young people [28]. Next to old age group, 20 to 30 age groups years (22.7%) dominate during the study followed 31 to 40 years (22.1%), and 41 to 50 years (16.9%) respectively. The least age groups are 51 to 60 years old that accounts 13%. Generally, Ethiopia should develop and provide different tourism activities, products, and services to much the demand of such different age groups traveling to the country.

Relating to marital status, the result indicates that majority of the respondents (42.9%) are married, followed by single which accounts for 39% of the total respondents. Divorced tourists are 8.4%, followed by cohabited (living together) without licensed marriage agreement (7.1%) of the total sample tourists. The inbound tourist which consist widowed tourists was also 2.6% of the total sample of the respondents.

Concerning to educational level 70.1% of the travelers are 1st degree holders or above, followed by 20.1% college graduates and 8.1% secondary school education respectively. The remaining very few (1.3%) of travelers are primary school and below. The result illustrates that the more educated tourists are more willing to travel to Ethiopia. This has a positive impact on destination choice and travel since there is strong correlation between education and employment (income) i.e. 56.5% of tourists were employed followed by 23.4% retired, 11.7% Self-employed respectively, however, un-employed tourists constitute only 8.4%. The amount of education obtained will most likely determine by the nature of

work and luxury time activities. The educational background of the tourist influence on the destination choice; when they are highly educated and know more, motivation to travel will increase to discover new place, culture and experience new ways of life. Similar with this result, Horner and Swarbrooke reveals that the increases in education of a particular population will have an effect on the income among population [10]. The income creates freedom to purchase, travel and expend on a given destination. In terms of their travel experience of the tourists to visit Ethiopia, majority of tourists have visited Ethiopia for the first time accounting 79%, whereas only 20.1% repeated visitation to Ethiopia. This needs quality guiding service and delivery of information about facts of Ethiopia.

Regarding to tourists length of stay in night, 53.7% of the tourists are stay in Ethiopia for 8 to 12 nights. 24.7% and 24% of the tourists of this study were also stay 1 to 7 nights and over 15 nights respectively. Only few tourists (15.6%) stay 13 to 15 nights. The quality of destination supply such as types of tourism activities, tourism products as well as services that are offered for tourist affect the length of stay for tourists at destination. This is also true in Ethiopia. Hence, Ethiopia should improve the quality of tourism destination supplies to get expected benefit from international tourism market.

The inbound tourism market of Ethiopia is dominated by European tourists which account of 70.1% while, 13.6% of tourists were generated from Americas, 11.7% from Asia and pacific countries. The remaining tourist arrivals from Africa and Australia very low constitute 3.2% and 1.3% respectively. The Oceania was the only developed region to send fewer (1.3%) international visitors to the Ethiopia. In accordance with this, MoCT (2013) state that tourist arrivals by region of origin, the large amount of visitors came from Europe representing 32. The second most important region that contributed visitors to Ethiopia is America, particularly North America with a participation of up to 31% of the total of tourists. Most of tourist generating countries are economically developed nations which have high disposable income that enforces to travel. The economic integrity of Ethiopia with these countries is also one of the main reasons for the flow of tourist to Ethiopia [28]. This cohesion should be further strengthened to use the opportunity.

Tourists purpose of visit to Ethiopia

The flow of tourists to Ethiopia is increasing from time to time for different purposes Majorities (59.76%) of guests travel for purpose of recreation (Figure 2). Most tourists are traveling to Ethiopia to visit the cultural and natural tourist attractions of the country to relax and recreation. Similarly states that, the number one purpose of tourists' travel to Ethiopia is for leisure and holiday. The country's cultural and historical resources are recognized by tourists. Ethiopia has 13 UNESCO registered world heritage sites and other proposed attractions. The country brand "land of origin" is also the reason for the flow of tourists.

19.66% of tourists also travel to Ethiopia for the purpose of business and 11.5% travel for MICE (Meeting, Incentive, and Conference and Exhibition) (Figure 2) since Addis Ababa is the head quarter of Africa union and diplomatic city in Africa being it has more than 110 embassies, and also other many governmental and non-governmental organizations. The country is stable in east

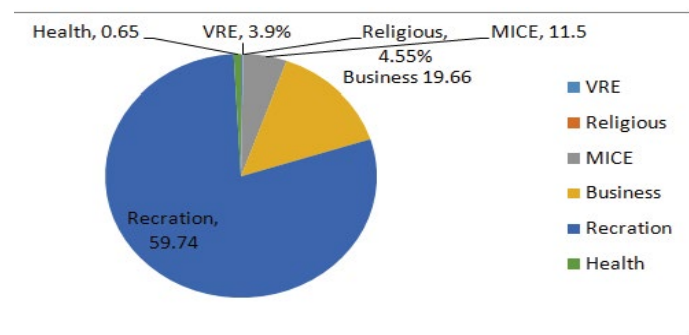


Figure 2: Respondents' purpose of visit to Ethiopia; Source: Field survey, 2018.

Africa and has good image in the perception and expectation of tourist. The country image on safety and security, political stability as well as strong diplomatic relationship with other country creates conducive environment to increase tourist arrivals to Ethiopia (28).

The travel for religious purpose and to Visit, friend and relatives (VFR) account 4.55% and 3.90% respectively. The study also shows that travel for Education, transit and health account 2.6% %, 1.95% and 0.65% respectively. Therefore, the industry should recognize the purpose of travel and serve them properly in accordance with their purpose of visit to satisfy their needs wants and expectations ultimately to be competent at international tourism market.

Major sources of information for tourists

Major source of information for travel decision of tourists include information from past travel experience, trade fair/ exhibition, internet, television, books, documentary, national geography channel, academic articles, word of mouth/friends and relatives recommendation, travel guides and brochures and tour agency [10,11,17].

As showed in Table 2, a range of information sources are used by tourists before travel decision to Ethiopia. Majority of tourist information source (30.5%) were internet. This result relates with Buckley et al. research findings which reveals as advancement of information communication technology affects the tourist to travel worldwide [36]. According to Amaro and Duarte Social media are also powerful sources for travel planning [37]. They elaborated as the internet availability (Google, Facebook, trip advisor, Instagram and Twitter) create new opportunity to contact directly with customers and develop deeper relationships with service providers; share information among customers and help to create influence on country image. Moreover, Esu and Ebitu added that Information is used to position, market and sell destination for the target customers [38]. They also pointed out that the tourists first search the information about profile of destination and create their awareness through searching by internet due to its cheapness. Similarly, interviewees also state as internet is the more dominant sources of information for tourists to select Ethiopia as a destination. They added that (Ministry of culture and tourism, tourism organization of Ethiopia, Embassies', missionaries, Tour Operators and Travel Agents promote Ethiopia's tourism attractions through using internet to be visited by international tourists. As result, internet is one of the best promotion tools to advertise the products worldwide.

Word of mouth is the second most used important sources of information (22.7 %) for tourists to select Ethiopia. These include recommendation by people who travelled before to Ethiopia, Ethiopian friends of tourists living abroad and diplomats of foreigner who are working in Ethiopia. 11.0% of tourists who had traveled to Ethiopia before used their past travel experience as source of information to repeat visitation and experience. Besides 9.1% of tourists search and read travel guides and brochures and attracted to select Ethiopia as a tourist destination. According to interviewees, travel guide like Lonely Planet and *Selamta* (Magazine of Ethiopia Airlines) are used as the source of information for tourists to select Ethiopia. The travel guide and different brochures prepared by the governments of Ethiopia (tourism organization of Ethiopia and culture and tourism of Ethiopia) and travel and tour operator used as sources of information for tourists.

7.8% of tourists also get information about Ethiopia through reading different books that state about Ethiopia' Natural, cultural, historical and archaeological facts. E.g. Holy Bible stories mentioned about Ethiopia 44 time; and other known books stating about the "Adwa victory" Battle of Ethiopia and Italy" also used as the source of information for tourists to select Ethiopia. Interviewees also stated that tourists especially the Italy are traveling to the northern parts of Ethiopia to see the battle field of Adwa victory. However, slight number of tourists read the book about Ethiopia prior to visit the country. Tourists also use trade fair (exhibition), television, documentary, national geography channel, academic articles, and direct contact of tour agency in low level.

Generally, tourists mainly use few types of information Sources to select Ethiopia for travel. This indicates weak use of alternative promotional methods to promote potential products and services to attract customers. Hence, Ethiopia should aggressively promote potential tourism products and services using international means of promotion media. This needs government commitment to investment in continuous media campaigns that provides information and attract potential tourist.

Pull factors

Natural resource and environment

As illustrated in Table 3 the maximum mean value of natural resource and environment attractiveness is 4.48 for beautiful natural scenery and landscape while; the minimum mean value is 3.64 for nature based activities like trekking, bird watching, bush walking. The overall mean value is 3.99 which lay at important level indicating that elements of natural resource and environment of Ethiopia has most important attributes to attract international tourists. It shows that the international tourists are amazed by natural resource and environment. Similarly, Ministry of Culture and Tourism of Ethiopia States that Ethiopia has spectacular landscapes namely, rugged mountains, flat-topped Plateaus, lowlands/ depression (deep gorges and river valleys), Volcano, lakes, rivers, fauna, flora, national parks, and other protected areas with wildlife, and endemic and globally threatened species [39]. Ethiopia is endowed with diverse features of spectacular and appealing features of natural resources that range from the Siemen Mountains with its endless panorama, which is 6432 meters above sea level and termed as "roof of east Africa" to the Danakil depression which is the lowest and hottest place on Earth

with active Volcano called Erta Ale with 114 meters below sea level that has high potential to draw more tourists to Ethiopia. The great east Africa rift Valley with its lakes, and Ethiopia's largest Lake Tana, the source of Blue Nile and Sof Omar cave are also the impressive natural scenery and landscapes of the country [40].

These varieties of landscapes make the country to own diverse features of climates, water bodies (lakes, rivers and tributaries) as well as fauna and flora. In this concern, the country has 5 types of agro-ecological climatic zones namely, Wurch/frost, Daga/cold, wina-daga/temperate, Kola/hot, Baraha/desert with 13 months of sunshine throughout the country which makes amazing to tourists. The diversity in landscapes and climate in turn makes the country to own many protected areas, wildlife, and endemic and globally threatened species [28]. Ethiopia has 25 national parks and many wildlife sanctuaries, game reserves, controlled hunting areas and community conservation areas. There are also 39 endemic mammals out of 320 total Species, 19 endemic birds out of 918 total Species, 16 endemic reptiles out of 240 total Species, 30 Amphibians out of 71 total Species, 38 Fish out of 172 total Species, 7 Butterflies (Insects) out of 1225 Arthropod total Species, 625 out of 6500 Vascular Plants [41]. Hence, Ethiopia is home of biodiversity in the world. Most tourists are visiting Ethiopia to experience with the origin of wild Coffee plant "Arabica" in Keffa, Walia ibex of Simen Mountain and Red fox and different bird species found in the Great Rift Valley lakes and Nechisar National Park [40]. Ethiopia has also potential bird watching areas like Lake Tana, the Rift Valley lakes (Abijatta Hawassa, Chamo, Abaya, lower Omo Delta, Goba-Yaabello, Bale, Nechisar and Mago National Parks [32].

As Interviewees state most tourists are impressed in nature based activities such as park and site seeing tourism, bird watching, trekking, hiking, rock climbing, desert expeditions, and eco-tourism. Regardless of high demand from international tourists for such activities, development as tourist products is low; and conservation areas including national parks are in danger due to poor preservation strategies specifically zoning problems and loose restriction with the local people settlement, farming and cattle ranging and firing. This affects tourism potential unless the measure is taken.

Generally, the study shows that Ethiopia has various attractive and astonishing natural tourism resource and environment. Therefore, the tourism product diversification is more important to attract potential tourists.

Cultural and historical resource

Table 4 depicts that group mean value for all components of cultural and historical tourism resource of Ethiopia is 4.05 with highest mean score 4.55 and lowest mean score 3.46 for Historical sites and Variety of local cuisine respectively. This implies, cultural tourism resources are better ranked and has the driving force to generate more tourist flow compared with other components. Yabibal discussed that Ethiopia is more attractive, in inherited resource being home for some of the famous and iconic hominid fossils and tools. Ethiopia deserves to be named as the "Cradle of mankind" where "Lucy" which is 3.2 million years old fossil hominid discovered in 1974 at northeast Ethiopia a specific place known as Hadar showing that how small our ancient ancestors were [19]. The real bones are found at Addis Ababa archives of

National Museum [32]. The long history and Ancient civilization of the country also influence tourists to choose Ethiopia for travel; because, Ethiopia is ancient one of civilized country in the world that dates back more than 3000 years [40,42]. Moreover, it has more than 80 ethnic groups with their own unique cultural wealth specifically diversity languages and life styles, traditional artisanal craft products; unique and rich culinary traditions, religious attractions (churches, monasteries and mosques that serve throughout the day), colorful and distinctive cultural festivals, events and holiday celebrations with diverse traditional music and dancing styles, traditional costumes, body art, hairstyle, daring intention and bull jumping ceremonies, traditional agricultural practices of the rural area, weeding ceremonies, funeral and other cultural ceremonies which are unique from the western culture are important to attract the international tourists [41]. The northern historic routes and the southern ethnological and nature based circuits have comparative advantage to attract and inspire tourists [3].

Regarding to, the country museums and art galleries the mean value were 3.58. Most tourists are impressed with Museum icons specifically National Museum of Ethiopia when they visit "Lucy" or *Dinknesh* and "*Ardi*" skeleton and fossil in the museum. However, some tourists mentioned, museums found in some parts of the tourist destination are not accessible and not well managed. Even some of the museums are opened occasionally for the visitors.

Large number of ethnic groups with their respective cultural events, artifacts, traditions and way of life provide ample opportunity to explore to travel. The country has potential of different religious and non-religious events and ethnic festivals that attract tourists like *Erecha* of the Oromo ethnic group, *Fich Chambalala* of Sidama region, *Meskel* (finding of True Cross), *Timket* (Epiphany). In addition, *Ashendiye*, *Shida* and *Solel* festivals celebration in *Tigriy*, *Sekota* and *Lasta* in the Amhara Region has the potential to attract the tourist [43].

In some parts of countries different foods are the pull factor for the destination choice of tourists i.e. food plays a major role in tourism [44]. However, the importance of Variety of the local cuisine of Ethiopia ranks at lowest level with mean score of 3.46 compared to other elements of cultural and historical resource for destination choice of tourists. That means, traditional cuisines of Ethiopia are not well promoted as tourism resources although they are unique from other world. *Injera*, *Doro wot*, *Key Wot*, *shiro wot*, *kitfo*, *shakila tibs*, and normal tibs are Ethiopian famous tradition foods. Traditional coffee ceremony, *taj* and *arekie* are also Ethiopian famous drinks. However, development and promotion of gastronomy tourism on local cuisines of Ethiopia is low and needs much activity. Many of tourists don't have awareness about local cuisines of Ethiopia even if some of them who tasted Ethiopian traditional foods and drinks appreciate how they are delicious [32]. Of course, food plays a major role in tourism; therefore, services related to food are very crucial. Nowadays, local food items at destinations are highly required and preferred; however widely depend on the cultural and geographic background of the guests [44]. Hence, develop and promotion of gastronomy tourism in Ethiopia is highly required.

Tourists' infrastructure

Tourist infrastructure is the basis for tourism development and

utilization of existing destination resources [45]. It is one of decisive component of tourist destination choice and is dependent on the General tourists' infrastructure development of the countries [46]. In this study, however, its development is the lowest to satisfy tourist expectation compared to other destination choice components with the group means score 3.25 (Table 5 and 6). This implies that in tourist sites general infrastructure is better than tourist infrastructure. Accommodation variety and quality, easiness to obtaining visa, food and beverage facilities and service as well as tour guiding services mean values are above 4 i.e. 4.03, 4.02, 4.01 and 4.01 respectively indicating that the service is perceived by tourists as best compared to other tourists' infrastructure specifically, accommodation variety and quality has highest rate. Of course, on the demand side, accommodation is one of crucial components that have major influence on visitors who are motivated and come to destination [47]. It plays vigorous role by providing the facilities that make travel convenient and comfortable for tourists [48]. Whereas, night life and entertainment activities, amusement/theme parks, adventure activities, recreation facilities and water based activities have mean score 2.36, 2.49, 2.71, 2.72 and 2.77 respectively implying that lowest mean score (below group mean 3).

In Ethiopia, tourist infrastructure and activities are not well developed to attract tourists. They have been hindering tourists to select Ethiopia as tourist destination and to participate on tourism activities although there is high opportunity to develop many types of tourism products and activities specifically, living culture tourism, gastronomy tourism, park and site seeing tourism, rural tourism, business and conference tourism, sport tourism, trekking, rock climbing, desert expeditions, water-based activities, thermal and health tourism, bird watching, and community based eco-tourism are urgently needed to be highly developed [49]. Because, tourists are constantly seeking to visit new sights and participate in a variety of leisure activities [48]. Ethiopia has great potential for Wellness and Spa tourism being rich in hot springs to list some of well known; the *Filwaha* in Addis Ababa, *Sodere* in Oromia Region, *Wondo Genet* in Sidama Zone, *Wonzayie* in Amhara Region. However, many of hot springs are not developed and promoted as tourism products [28].

Tourists strongly commented their observation of the tourist infrastructure problems in some city of the country mainly; the inadequacy of the tourist information center in the major tourist destination; transportation problems especially delay of domestic flight, lack of signage public transport (i.e. direction of entrance and exit), the high price of car rent; lack of public toilet in the street; lack of awareness of tourist police on the major tourist destination; problems of recycling and collecting rubbish and the high price of accommodation in peak season. The provision of tourist information center in the major tourist attraction sites is inadequate to provide information to visitors.

In general, this finding designates that development and performance of tourist infrastructures in Ethiopia is low at tourist destination. In the same way, WTTC finding shows that Ethiopia has ranked low in tourists infrastructure service compared with the sub-Saharan country like Kenya, South Africa and Egypt [6].

General infrastructure

Infrastructure is an important aspect in promoting destination [45]. It is used to enhance cultural, historical and natural attraction as well as to build the overall image of the country [43]. It influences soft infrastructures such as health, banking and security services for the travel decision of tourist [45]. Contrarily, as shown on the Table 5 and 8, in Ethiopia, the general infrastructure is the second lowest in group mean 3.67 compared to other destination choice components. Electricity supply and ICT infrastructure services are better elements of general Infrastructure for destination choice with 4.20 and 4.06 mean score respectively; While, commercial infrastructure and health facilities and services are at lower level with 3.10 and 3.23 mean score correspondingly. The poor banking facilities of Ethiopia like the inability with pay in credit card, travelers' cheques and other modern mode of payments are dissatisfying the tourist to choose the destination for travel. Local transportation efficiency and quality of road and highway are also very important factors to tourism activity. In line with Ethiopia, however, the score mean is 3.66 and 3.52 respectively indicating that road access and development of highway are at low stage. The road traffic accidents related with lack of professional licensed driver and technical problems and traffic congestion in the main road were deterrent problems of the transport sector and that also affects the tourism industry of the country. The newly established highway from Addis Ababa to Hawassa is however the manifestation of the road and highway infrastructure development of the country.

Political and local community aspects

As demonstrated in the Table 7 Political stability, hospitality of residents towards tourists and Safety and security to tourists in Ethiopia are rated as better compared with other Political and local community aspects with mean score of 4.24, 4.18 and 4.10 respectively. This finding corresponds with recent research by Yabibal that reveals Ethiopia as the only stable country in Eastern Africa. He stated that the numbers of tourists fall sharply at times when there is a political turmoil and areas where tourists don't feel safe. In the same way, Fabricius, States that the peoples of Ethiopia are culturally hospitable to build the image of their country as a tourist destination; the courtesy and willingness of the local residents and employees at destination to help tourists is positive and friendly which is decisive factor for the destination choice. Besculides, Lee, and McCormick reveals as the success or failure of a tourism destination depends on being able to provide a safe and secure environment for visitors; since they are decisive factor for the free movement of tourists within the country [49]. Hence, it is vital to provide quality service to tourists to minimize the impact of tourists' destination [47]. Correspondingly, tourists in Ethiopia are secured and travel safely within the country (Table 7). In accordance with this, Ethiopia has better ranked in travel and tourism competitiveness index compared to South Africa, Kenya and Egypt [6]. Nevertheless, Prioritization of Tourism and Hospitality sector in Ethiopia is yet ranked lowest.

Tour guiding services

Tour guiding service is the 3rd most important destination component of the Ethiopia where by all the elements of tour

guiding service are dispersed around group mean value 4.00 (Tables 8 and 9). Image building (reputation) of country and service quality of tour guiding has highest score mean value of 4.25 and 4.21 respectively compared with other parameters showing that ambassador role of guides. On the other hand, Meeting tourists' needs of the tour guiding service, the interpretation and communication skill, and ethical business practice mean values are rated 3.95, 93 and 3.92 respectively. Even though knowledge on the tourism and hospitality of the tour guiding services is important element to provide appropriate information to tourists and also to promote the country's tourism potential for the target tourists, its mean score rate is 3.72 ranking the lowest of all. Of course, tour guides as key representative of destination play a significant role on tourist satisfaction and re-visit intention. They can also influence the demand and travel preference of tourists [50]. The success tourism industry of a country highly depends on of the service quality of tour guides. They play the key role to transform the tourists' visit from a tour into an experience through their knowledge and interpretation about facts of destinations because, tourists expect to be offered quality tourism product and tour guiding service [6]. Hence, tour guides should provide quality service for the target market.

Group mean difference of destination components

As displayed from the above table, except tourist infrastructure, all destination components of Ethiopia are above the ideal mean value (3). Cultural and historical tourism resources are ranked best compared with other components of travel and tourism followed by natural resources and environment, tour guiding service, political and local community aspects, general infrastructure and tourist infrastructure in that order. The ranking of cultural and natural tourism resources of Ethiopia in this finding also corresponds with the findings of Yabibal as he reveals the existence of cultural and natural tourism resources of Ethiopia are better ranked than the tourism infrastructures in attracting tourists specifically (Table 10).

A study conducted by Shah also shows that destination attractions (pull factors) are the primary determinants of destination attractiveness for tourists since no one would travel to a place without destination attractions. Hence, Ethiopia can develop many types of tourism products and activities; Living culture tourism, gastronomy tourism, park and site seeing tourism, rural tourism, business and conference tourism, sport tourism, trekking, rock climbing, desert expeditions, water-based activities, thermal and health tourism, bird watching, and community based eco-tourism are urgently needed to be highly developed [51].

Reliability analysis

Cronbach's alpha reliability coefficient normally ranges between 0 and 1. However, there is actually no lower limit to the coefficient. The closer Cronbach's alpha coefficient is to 1.0 the greater the internal consistency of the items in the scale. Based upon the formula $\alpha = rk / [1 + (k - 1)r]$ where k is the number of items considered and r is the mean of the inter-item correlations the size of alpha is determined by both the number of items in the scale and the mean inter-item correlations. George and Mallery (2003) provide the following rules of thumb: " $\alpha > .9$ - Excellent, $\alpha > .8$ - Good, $\alpha > .7$ - Acceptable, $\alpha > .6$ - Questionable, $\alpha > .5$ - Poor and $\alpha < .5$ - Unacceptable".

According to Fraenkel and Wallen scales with a coefficient α between 0.80 and 0.95 are considered to have very good reliability, Scales with a coefficient α between 0.70 and 0.80 are considered to have good reliability, and α value between 0.60 and 0.70 indicates fair reliability [52].

CONCLUSION AND RECOMMENDATION

The finding of this research indicates that Ethiopia has immense potential of natural, historical, cultural and archaeological tourism resources. The country has very old and well preserved fascinating churches and monasteries, steles, monuments castles, historical traditions and an attractive cultural diversity of above 80 nations and nationalities. To witness, 13 UNESCO registered tangible and intangible natural and cultural heritage sites are some of implications of its rich resources which makes to be unique and to rank 1st in Africa in terms of number. Due to this reason, Ethiopia has great opportunity to develop many types of tourism activities and to get benefit from its tourism resources endowment. However, the country's use of these opportunities and tourism products and services development is found at low level i.e. natural resources and environment, cultural and historical resource, general infrastructure, tourist infrastructures, political and local community aspects and tour guiding service are not able to compete at international level.

The study also indicates that the push factors such as origin of tourists, gender, age, marital status, educational status and economic level has influence on tourists' decision of destination choice of Ethiopia. The country's use of alternative promotional methods is not strong enough to promote potential products and services to attract customers. Hence, tourism competitiveness of Ethiopia is low in attracting tourist arrivals and receipt compared to other African countries especially Kenya, Tanzania, Uganda and South Africa.

It is trusted that this study will provide a map of the level of competitiveness in the tourist industry for the tourist destination of Ethiopia and provide a guideline to set and implement public policies, to formulate and implement strategic destination plan, to monitor the efficiency and effectiveness of the actions taken, to prioritize actions to be taken, and to allocate the resources that will benefit the sector and to support service for Medium, Micro and Small size enterprises.

Based on the finding, the following points are recommended:

- The quality of tourism products and services of the country should improve to be competent at international market. In this respect, different actors' such as tourism destination marketers, hotels, tour and travel agents, tourism academician and culture and tourism of Ethiopia should make a concentrated effort and devise various mechanisms to maximize the competitiveness of Ethiopia as best tourist destination. The tourism product development and diversification should be initiated by the government to provide mixed and new products and to elongate the length of tourist stay as well as increase expenditure of tourists.
- Public and private stakeholders should involve to develop different types of tourism activities like living culture tourism,

gastronomy tourism, park and site seeing tourism, rural tourism, business and conference tourism, sport tourism, trekking, rock climbing, desert expeditions, water-based activities, bird watching tourism, community based eco-tourism, adventure tourism activities, recreation facilities and spa tourism since they have the potentials to attract more tourists.

- General and tourist infrastructure is an important aspect for the proper utilization of tourism potential and destination competitiveness of Ethiopia. Therefore, the provision of the tourists' infrastructure in line with general infrastructure facilities and services is highly required to satisfy the needs and experience of tourists at destination. Hence, destination development activities and infrastructure development like accommodation, airport, road and rail way communication technology should be strategically planned and implemented to make Ethiopia competent tourist destination/market and ultimately to share the benefit from international market. Furthermore, the government should Prioritization for tourism and hospitality sector as a driving force for the Socio- economic development as well as for the positive image of the country.
- Tourism potential of the country should be aggressively promoted by using different international promotion methods to attract potential tourists. Most spoken language specially, English, French, Germany, Arabic, Italian, and Spanish should be used to rich the information to origin of tourists. This needs commitment of governmental and non-governmental as well as private organizations and community to investment in continuous media campaigns that provides information and attract potential tourist.

LIMITATIONS AND FURTHER RESEARCH

Thematically, this study used The World Economic Forum competitiveness index model. Hence, it lacks to observe other dimensions of models. It is realistic to specify the study area of any research. However, this study was conducted at country level as tourism destination the fact that to get general understanding of tourism competitiveness of Ethiopia as tourism destination. As such, it has a scope limitation. Methodologically, it used mixed (qualitative and quantitative) method with descriptive and explanatory design and the data was collected only from international tourists, tour operation managers and secondary data. Hence, it lacks to observe other methodologies. This might affect the representativeness of data gathered to certain extent. This makes the finding to be limited. Future researches are recommended to be conduct through other models and methodologies and the scope to be to be conducted at specific tourism destinations of a country. In addition, future researches can collect primary data from local communities and other stakeholders; and secondary data can be collected from various international organizations and a survey among leaders and executives present at different conferences, meetings and forums. Further inferential statistical tests can be used to quantify the items from this study before they can be generalized.

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