

# Tourism in Ethiopia: An urgent opportunity for economic diversification

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## Abstract

'Ethiopia!'. The name conjures up images of poverty, starvation, and conflict – remnants of the horrors of the ill-fated communist Derg era of the 1970's. Yet the Ethiopian economy is growing at one of the highest rates in the world driven by massive infrastructural investment, much of which is financed by the Chinese (Sisay, 2016). Ethiopia still requires extraordinary growth and development to satisfy the development needs of the country, although policy makers are lethargic in taking advantage of the significant role tourism can play in this regard. Urgent attention is drawn to the opportunity cost of not developing the tremendous inherent potential of this industry. Drawing on theory, observation, analysis and case study research, the article describes the context of tourism in Ethiopia, and how tourism can support Ethiopia's development needs. It provides a range of recommendations to develop the tourist industry, including prioritising tourism development through the initiation of a tourism strategy and immediate destination development and marketing for Addis Ababa.

**Keywords: Ethiopia; tourism development; tourism strategy; tourism policy; destination marketing; economic diversification.**

## Introduction

When telling friends and family of a planned trip to The Federal Democratic Republic of Ethiopia (Ethiopia), the response is unfortunate. There is normally an insensitive quip related to past famine experienced in the country during the mid-1980's, when more than one million Ethiopians died, and the more recent concerns that Ethiopia was once again facing famine in 2016 due to severe drought conditions (Jeffrey, 2016). Coupled to the genocide of the Derg period where an estimated 500,000 people were killed (Red Terror Martyrs' Museum), visiting Ethiopia for a holiday is not on most peoples' bucket list.

Yet, as this article points out, the country is the Holy Grail (excuse the pun for the country is rich in religious heritage) of Africa. It has experienced phenomenal economic growth; achieved great strides in infrastructural development, much of which with Chinese assistance; it provides an authentic African experience with a wealth of archaeological, cultural, religious and natural wonders to explore; delivers national security which is relatively good compared to other tourist destinations in Africa, such as Kenya and Egypt which have had their tourist

industries damaged by recent terrorist activity; and it is home to the continent's largest international airline, Ethiopian Airlines.

The authors will argue that Ethiopia is well positioned to immediately embark on extensive tourism development, and through tourism, diversify its economic base and facilitate growth and development for the country as a whole. Failing to do so, will be a significant opportunity cost to the country.

### **Methodological construct**

This article is a multi-disciplinary case study that combines existing theoretical constructs with case study and content analysis methodologies. This provides both the theoretical framework and context that describes the tourism sector in Ethiopia and helps illustrate the strategic options available to develop this sector and support the broader development needs of the country. The theoretical constructs explored include development economics, tourism planning and tourism policy, and strategic destination development.

The qualitative methodology adopted was that of an exploratory case study comprising a wide range of data collection methods including observation and interviews – augmented with content analysis of tourism policy documents and a range of tourism related websites. Observation took a number of forms. For instance, in Addis Ababa in 2015, the one author made use of a wide range of public transport facilities and visited key tourist attractions, in order to gain an authentic experience of the tourist infrastructure and tourism products available in the city. A number of unstructured interviews were also conducted while the author was in Ethiopia. This included interviews with local businessmen, members of the public, academics, foreign tourists and expatriates. The interviews were phenomenological in nature, and were intended to provide insight into the individuals' experiences and perceptions. For instance, tourists residing in the same establishment as the researcher, who had travelled extensively in Ethiopia and elsewhere in Africa, were enlisted to provide information on their experiences, the cost of travel, views on the tourist products available in the country, and their experience with crime.

Interviews included Andries Radyn, the in-country representative of the University of Stellenbosch Business School's Executive Development Programme in Ethiopia and Kenya; Ivan Cheng, an intrepid Canadian traveller who has travelled extensively in West Africa and was journeying through Ethiopia at the time this article was being written; Torbjörn Börjesson, a travel blogger also travelling in Ethiopia at that time; and a range of participants at the BEN-Africa (Business Ethics Network – Africa) conference in Addis Ababa in November 2015.

Further structured electronic interviews were conducted with Ethiopians who volunteered to participate in the research, such as Admassu Abera (an Ethiopian business consultant) and Biruk Wondem, lecturer and PhD candidate in finance. These interviews added depth to the understanding of the challenges facing the tourism industry in Ethiopia. Obtaining information on the tourism institutions in Ethiopia proved to be difficult, but fortunately, an individual who has insight into such institutions, consented to participate in the research on condition of anonymity. The facts and views provided by this individual provided a more thorough comprehension of the internal operations of Ethiopian tourism institutions.

Personal face-to-face structured interviews were also conducted with subject matter experts. Gian Angileri, a contracted assessor to the Tourism Grading Council of South Africa discussed the international role of quality assurance in developing tourism and ensuring a positive

experience for tourists. Erenei Louw of Nelson Mandela Bay Tourism is an information technology specialist responsible for, amongst other duties, website development, database development and tourism research. Doné Louw, also of Nelson Mandela Bay Tourism, is a destination marketing specialist, and who has a specific interest in e-commerce, e-marketing, tourism trade, and conference and event bids. Their experiences in destination development and marketing are the basis and support of many of the recommendations suggested in this document. The results of the content analysis, the case study observations and the interviews, are reported in a narrative manner describing the interrelationship between the findings; patterns that emerge; and the intuitive conclusions drawn from these findings (Thomas, 2011: 184; 209). The trustworthiness of this research can be substantiated through the adoption of the constructs of credibility, transferability, dependability and confirmability (Shenton, 2004: 64).

The first theoretical construct explored is that of development economics, and the contributing factor that tourism can have on growth and development.

### **Tourism – a vehicle for economic development**

Intuitively, tourism could be considered a valuable development opportunity for Ethiopia. Tourism can provide work opportunities; support the establishment of small, medium and large enterprises; lead to skills development in tourism and support services; contribute to rural development; improve infrastructure; and ultimately contribute to the government's coffers. Tourism can be a powerful stimulant for economic growth and development. This is especially true for economies with limited resources, where on a macro level, economic growth can be fostered through foreign exchange earnings and increased state revenue, while on a micro level, it can lead to an improvement in individual well-being through job creation, better revenue or income distribution, and balanced regional development (Dieke, 2003: 287).

Diversification of the economy and export driven growth are important contributors to sustainable economic growth. Ethiopia with limited mineral resources has opted for a strategy of industrialisation to help it on its growth trajectory. In view of the 'Angola-mode' framework agreement with China, Ethiopia is also much dependent on this process of industrialisation to repay China for the significant infrastructural projects China has financed and developed (Angola-mode is a term coined for the reciprocal swap agreements between China and certain African nations, where infrastructural projects funded by the Chinese are usually repaid through the oil and mining resources particular to the country in question).

The question arises whether tourism can also contribute to the development needs of the country, enhance economic diversification, and support export driven growth (tourism is a foreign revenue generator). Clunies-Ross, Forsyth and Huq (2009: 108 – 122) describe a number of development economic postulates where the authors suggest tourism can play a significant role as explained below:

- Tourism development, especially when this sector is significantly underdeveloped, could contribute towards a sustained 'shock' that could permanently increase income levels for many working in this sector, and thus facilitate the collapse of the 'vicious cycle' described in the theory of vicious and virtuous cycles. However, this would require capital investment in this sector, notably in infrastructural development.
- From a balanced growth perspective, tourism could certainly contribute to a more balanced development approach, supporting other development efforts such as wide-scale industrialisation attempts of Ethiopia. Tourism also falls within the ambit of

structural-change models of growth, such as the broadening of markets through international trade, the absorption of surplus labour, and the contribution to savings and investment.

- Importantly, it is aligned to addressing the gaps in the 'two-gap' model of development. By its very nature, tourism can be a significant contributor to foreign exchange earnings and bolster the country's balance of payments. Again foreign direct investment in tourism infrastructure may be required to address the initial savings-investment gap.

Tourism's contribution to poverty alleviation and job creation can be powerful. As Miles (2014, 1) points out in reference to the Uganda Inclusive Tourism Program, "in the short to medium term, tourism will be one of the key drivers in the country's efforts to reduce poverty, and has great potential for foreign exchange generation, job creation, and provision of livelihoods to a significant proportion of the population".

In conclusion, tourism can certainly contribute to economic growth and development for developing countries. The context of Ethiopia is now discussed to obtain a better understanding of tourism's potential contribution to growth and development in the country.

### **Untapped tourism opportunities for Ethiopia**

Ethiopia possesses a plethora of tourist attractions, yet tourism infrastructure is at its infancy; tourist products are poorly maintained; access to tourist products are difficult and can be inappropriately expensive; and there is a lack of marketing to attract tourists to the country, and a lack of marketing of tourist attractions once tourists are in the country. The lack of marketing within Ethiopia is evidenced by the profound absence of tourism information at Addis Ababa's Bole International Airport. There is a lack of signage to tourist attractions and it is almost impossible to find brochures or maps of the city or its attractions.

The annual research report by the World Travel and Tourism Council (Travel & Tourism: Economic Impact 2015 Ethiopia, 2015) on the economic impact of tourism for Ethiopia sheds some light on the laggard nature of tourism in the country. The data refers to statistics gathered in 2014. Travel and tourism directly contributed only 4.1% to the country's GDP, and 3.6% of total employment. The country's limited exports are reflected in visitor's (tourist) exports contributing 35.4% of total exports, suggesting that tourism can play a significant role in foreign exchange generation. Investment in travel and tourism was 3.7% of total investment for the country. From a world ranking perspective out of 184 countries, Ethiopia ranks at 97 in terms of relative size contribution of tourism to GDP, and only 150 in terms of tourism's growth forecast for 2015 (Travel & Tourism; Economic Impact 2015 Ethiopia, 2015: 1).

Further in this article, the tourism policy and tourism institutions of Ethiopia are described. One aspect is the vision of the Ethiopian Tourism Organisation's goal of becoming one of the top five destinations in Africa, with over 5 million tourists (per annum) and generating US\$ 7 Billion income (F.D.R.E. Ethiopian Tourism Organisation, 2016). This is in stark contrast to the 2025 forecast by the World Travel and Tourism Council of direct contribution of travel and tourism to GDP of ETB 40,130.3 mn (Ethiopian Birr) which equates to approximately US\$ 3 Billion (Exchange rate 1ETB = 0.0464037 USD as at 27 March 2016). Even more concerning is their forecast that the contribution of travel and tourism to employment levels will only increase by 0.4% from 2014 to 2025 (980,000 jobs) (Travel & Tourism: Economic Impact 2015 Ethiopia, 2015: 3 – 4).

This article is concerned with tourism which includes revenue from travel (tourism transport). However, it is important to note that one aspect that is not distinguished by the World Travel and Tourism Council (Travel & Tourism: Economic Impact 2015 Ethiopia, 2015) is the contribution of travel towards tourism versus other aspects of tourism towards GDP, job creation and foreign revenue. The sheer size of Ethiopian airlines could skew these statistics significantly in favour of travel rather than other tourism revenue. Ethiopian Airlines is now the biggest airline in Africa, with its fleet of 81 large aircraft, it surpasses that of South African Airways' fleet of 65 aircraft (Ch-aviation airline directory, 2015).

Academic research on the tourism industry in Ethiopia is limited. While referencing some relevant academic journals, this research also makes use of news articles and personal communication to provide a better understanding of the tourism industry. While tourism in Ethiopia has the potential to facilitate development through generating income and creating employment in Ethiopia (Ajala, 2008: 74), this potential has not been exploited to any great extent. The challenges to developing tourism in Ethiopia are explained by Wondem (personal communication, 2016): "(Ethiopia) lack(s) infrastructure (resulting in) power fluctuations, lack comfortable roads, lack of consistent utilities like water, lack of people awareness and education how to treat the tourists on their stay, conservation problem of naturally tourist attractive areas".

The success of Ethiopian Airlines is having a positive but limited impact on Addis Ababa. In-transit accommodation is growing in the city and hotels are getting face-lifts, stimulating some tourism, construction, and job creation (Mkhabela, 2015). However, Ethiopia is considered lagging in tourism in Africa, ranking 17<sup>th</sup> on the continent with regards to overseas tourists, although the tourism sector has the potential to overshadow coffee exports, currently the country's biggest foreign income generator (Jeffrey, 2014).

The Prime Minister, Hailemariam Desalegn, has shown some commitment to developing the tourism industry through the establishment and chairing on a high-level committee to tackle the lack of development in this sector. A concern is that many people in government lack international exposure and therefore do not comprehend the positive economic role that tourism can play (Jeffrey, 2014). A further concern is the practice of dual pricing structures – charging international tourists higher prices than what they charge the locals: "a lot of things and places have two prices, 1 for locals and 1 for foreigners... this can be annoying" (Börjesson, personal communication, 2016). Even Ethiopian Airlines introduced higher prices for foreigners on domestic flights in 2013 (Jeffrey, 2014).

Tourist products are quickly becoming expensive, which in the long run could impact negatively on tourism in the country. For example, prices at tourist highlights, such as Lalibela, have sky-rocketed. According to Cheng (personal communication, 2015), Lalibela has a US\$ 50 admission fee, up from US\$ 20 three years ago. Monasteries charge US\$ 5 which is expensive when visiting a number of monasteries. If a church is locked, a 'runner' (facilitator) is needed to get the key which costs approximately US\$ 7. Drivers cost about US\$ 100 per day. Börjesson (personal communication, 2016) states that "Ethiopian tourism has one (key) problem and that is there are no set prices. Everything is negotiable most places have no price advertised. This means that it is difficult to know if you're getting ripped off or not".

Revenue generated from tourism has also not filtered back into infrastructural development, such as improving access roads and public facilities. "Many tourist dollars (are) going there (Danakil), yet it seems the money isn't going into developing the villages in the area: there's

an appalling amount of litter, and toilets are either non-existent or in very appalling conditions” (Cheng, personal communication, 2015).

Roads and public transport is very slowly improving, yet still has a long way to go:

“Lalibela is supposedly the one must-see, yet it is appallingly connected, with at least two if not three bus transfers necessary to get (from Lalibela) to Addis or Mekele – You’d get on a bus going in one direction and hope the driver remembers to stop where you have a transfer. Bus stations are a hassle, where touts frequently crowd around you and try herd you into their minibuses or tuktuks and overcharge you. In the rare chance that a police officer spots this happening, you may get to witness a beating... With no signs, you have no idea where to go and just have to trust... someone” (Cheng, personal communication, 2015).

While not making light of the anti-government protest action and sporadic ethnic conflict experienced in 2016 (Protests across Ethiopia leave more than 12 dead, 2016), these have not escalated into widespread conflict, and more importantly, Ethiopia has not experienced terrorist attacks against tourists. From this perspective, travelling in Ethiopia is relatively safe, although petty crime against tourists is a concern. While the researcher was in Addis Ababa, many tourists and visitors encountered reported having experienced some level of crime. From an attempted pick-pocketing to an entire backpack being stolen (with all the crucial documents and funds), it seemed as though petty crime was a growing concern for the city.

Past research on the state of tourism in the Addis Ababa-upper Rift Valley corridor, identified a number of challenges facing the development of the tourism industry in the corridor: lack of information on the area; poor sanitation standards and unsavoury conditions in smaller hotels and restaurants; ‘chronic’ begging and ‘tourist-baiting’; mismanagement of tourist products and resources; lack of trained manpower; neglect of major cultural sites; and lack of regulation and monitoring of tourist infrastructure and services (Kidane-Mariam, 2015: 8).

Similarly, research on community-based ecotourism at the Wenchi Crater Lake also highlighted the problems encountered in developing tourism regionally, and the negative impact this has on these communities. Ketema (2015: 42 – 46) found the following barriers to developing community-based ecotourism: conflict of interest where a lack of participation by locals in tourism development resulted in unequal benefits from tourism; conflicts over resource usage and land ownership; environmental degradation due to uncoordinated use and management of the lake (for example, the planting of eucalyptus trees is undermining the supply of water to the lake); lack of infrastructure and basic facilities; and the lack of national and regional strategies and frameworks to support ecotourism.

It is appropriate to highlight some of the tourism assets Ethiopia possesses. Ethiopia has a rich religious and cultural history, as well as numerous natural wonders – it hosts 10 UNESCO World Heritage sites. It undoubtedly has the potential to offer tourists a wide range of exciting activities, some of which are described below. Addis Ababa itself is an intriguing city to visit. It’s a complex city experiencing tremendous growth while blemished with poverty and grime. The city holds hope for unsurpassable development, not only for the city itself, but as a stimulus for Ethiopia at large, and the East African region in general.

Ethiopia’s Ministry of Culture and Tourism (2015) lists some of the natural highlights available to gallant visitors who venture out from Addis Ababa. These include the Simien Mountains

National Park, a UNESCO World Heritage site, which boasts spectacular geographic landscapes and unique wildlife; the Mago National Park on the eastern bank of the Omo River; Lake Tana, the source of the Blue Nile and home to the Blue Niles Falls; and Sof Omar cave system, the most extensive underground cave system in the world, and currently an Islamic Shrine with a religious history spanning thousands of years. The country has a rich cultural diversity reflected in the 88 languages spoken. The Ministry (2015) further suggests that the tourist to Ethiopia can visit and learn of the Semen Mountain people, home to Ethiopia's mother language, Amharic; the Konso fortified settlements; and the Omo people in the Omo National Park.

Christians and Muslims live in peaceful co-existence and are proud of their significant historical significance in places such as Axum, home to historical monoliths and regarded as the holiest city in Ethiopia; and Lalibela, which is termed the Eighth Wonder of the World and is regarded as one of the holiest cities worldwide with churches hewn out of rock dating back to the 11<sup>th</sup> century AD (Ministry of Culture and Tourism, 2015). There are also a range of other buildings scattered throughout the country, such as Fasil's Castle Gondar in the city of Gondor dating to the 17<sup>th</sup> century AD. Cheng (personal communication, 2015) describes the remarkable religious context of travelling in Ethiopia:

“Ethiopia has a history entirely unique unto itself, with a state religion unable to be witnessed anywhere else. It manifests all over the place: monasteries with some incredible paintings in Ethiopian style, monks-to-be training in villages everywhere, unique religious relics like the Ethiopian cross that each monk holds or some thousand-year old Bibles in Ge'ez or some royal robes or crowns that many of the churches and monasteries seem to have, fantastical stories like how the monastery Debre Damo came to be when a serpent sent by God took a saint up on a mountaintop (it's the monastery which only men can enter, and must access only by climbing a 15m wall), the rock-cut churches in Tigray and Lalibela of an architectural style entirely of its own class (11 churches, each cut into rock, some standing monolithically as if they were constructed buildings), and of course, the citizenry themselves. People cross themselves, kiss walls and floors, and prostrate themselves when at churches and monasteries, and even do some of that when just driving past one”.

From an archaeological perspective, Ethiopia has a number of fascinating finds. The Tiya Stones is a UNESCO World Heritage Site comprising 36 standing stones – a prehistoric burial ground of the ancient Ethiopians. The Lower Awash area is currently an archaeological compound, where archaeologists are excavating a gorge that was home to the earliest of mankind's ancestors. 'Lucy', dating back to 3.5 million years, and 'Ramides', dating back to 4.4 million years, were both discovered in Ethiopia (Ministry of Culture and Tourism, 2015).

It is clear from the above discussion that Ethiopia has huge inherent tourism potential, yet the industry is at its infancy and plagued with numerous challenges. The question arises as to what the Ethiopian government has done to address tourism proactively? The following section will explore the tourism policy the country has in place as well as the institutions established to manage tourism.

## **Ethiopian tourism policy and institutions**

Even in light of the enormous potential Ethiopia holds, this article continually reflects on the general lack of tourism infrastructure and coordination within Ethiopia. It is therefore necessary to explore the existing tourism policy and institutions that are in place, and discuss their apparent lack of success in developing tourism in the country.

At the outset, it is important to note a significant limitation of this section's discussion. The author did not have access to Ethiopia's Ministry of Culture and Tourism nor the Ethiopian Tourism Organisation. Both of their websites did not provide email addresses for direct contact, and telephone numbers listed in their 'contact us' drop down menu were incorrect or were not functioning (F.D.R.E. Ministry of Culture and Tourism, 2016). The discussion below therefore relies substantially on publicly accessible material and revolves around the disconnect between policy, institutions, implementation and the critical outcome of developing the tourism sector of the Ethiopian economy. Some of the above limitations are mitigated through one significant participant in this research. On condition of anonymity, an individual actively involved in the tourism sector, who has keen insight and experience into some aspects of tourism policy and tourism institutions of Ethiopia, agreed to participate. This contribution goes some way in clarifying tourism policy in Ethiopia and the functioning of the institutions responsible for tourism development.

The Ethiopian Ministry of Culture and Tourism's (F.D.R.E. Ministry of Culture and Tourism, 2016) mission is "to study, preserve, develop and promote the cultural wealth and national tourism attractions of the nations, nationalities and people of Ethiopia and to build the positive images of Ethiopia with a view to adding a sustainable socio-economic and political values with popular and stakeholder's participation" (grammatical errors are as per the mission statement). It further details its vision of making Ethiopia one of the top five tourist destinations in Africa by 2020.

Only recently, in 2005, was the existing Ministry established, and it has yet to prove its ability to develop tourism (F.D.R.E. Ministry of Culture and Tourism, 2016). In addition, the tourism industry itself has been greatly influenced by the upheavals in the country. For instance, the 1974 revolution resulted in a socialist military government, which nationalised businesses, including hotels. While the regimes have changed since then, currently adopting a more mixed economic approach, in some senses, the tourism industry remains in its infancy due to structural constraints of the past.

A poignant statement in Ethiopia's Tourism Development Policy highlights exactly this problem: "Because of the absence for long of a clear policy that would lay the direction for the cooperation and coordination that should exist among the government, the private sector, the community at tourist attraction sites, the general public and other stakeholders, it has not been possible for the country to derive full benefits from the sector, and development has remained uncoordinated and unsustainable" (F.D.R.E. Tourism Development Policy, 2009:1). The current publicly accessible tourism policy is dated 2009 (F.D.R.E. Tourism Development Policy, 2009) and it has not since been revised (anonymous, personal communication, 2016). Without going into detail of the 34page document, it is worth noting that the policy has a number of commendable attributes. It reviews the current status quo of the tourism industry; details the need for such a policy; describes a strategy; allocates responsibilities; and specifies sources of finance to fund implementation of the policy.



According to the anonymous participant, the policy does provide clear guidelines for the industry and gives attention to the industry's development. "Now tourism is a hot issue and clear understanding was taken regarding the potential and its contribution for the economy(y)" (anonymous, personal communication, 2016). While the policy has a number of admirable qualities, it is lacking in detail. More importantly, it would appear that the policy has not been implemented to a significant degree. Institutions supporting the tourism agenda include the Tourism Transformation Council, the Tourism Board and the Ethiopian tourism Organisation.

Referring to regulation number 294/2013, Birhanu and Negussie (2015: 2) describe how the regulation formulated the establishment of the Tourism Transformation Council; the Tourism Board; and the Ethiopian Tourism Organisation. It was envisaged that these bodies would bring about a transformation of the tourism sector, thus galvanizing tourism.

The Tourism Transformation Council is a potentially valuable entity to enable tourism. It comprises of the Prime Minister and a range of tourism stakeholders, with an intention to implement similar regional structures, which reflect the importance government attributes to tourism. "The council set(s) a strategic direction, provide(s) leadership and give(s) instructions to the overall country level tourism development" – perhaps this is reflected in the perception by stakeholders that government is giving attention to tourism (Birhanu and Negussie, 2015: 18).

The Ethiopian Tourism Organisation was established in 2013 and is subordinate to the Ministry of Culture and Tourism. It is regarded as one of the key successes of the Ministry of Culture and Tourism (anonymous, personal communication, 2016). It is described as "an autonomous federal government organ having its own legal personality of Ethiopia by exploring new destinations and marketing the tourist destination places" with Vision 2025 of "making Ethiopia among the top five tourist destinations in Africa by 2025" achieving five million tourists and US\$ 7 Billion income (F.D.R.E. Ethiopian Tourism Organisation, 2016). Its activities are said to be guided by the 'Tourism Board'. It is worth noting that the Ethiopian Ministry of Culture and Tourism's vision (F.D.R.E. Ministry of Culture and Tourism, 2016) mentioned earlier was for it to be among the top five destinations in Africa, although the goal date was earlier, namely 2020, which is perhaps an indication that it was taking a longer time to initiate tourism development than had been initially expected.

The Tourism Board consists of private and public stakeholders, and oversees, guides and approves activities of the Ethiopian Tourism Organisation (Birhanu and Negussie, 2015: 17). The board members at the time of Birhanu and Negussie's research included significant participants in the tourism sector such as the CEO of Ethiopian Airlines; Director General of Ethiopian Airports Enterprise; Commissioner of the Ethiopian Investment Commission; Director General of Immigration and Nationality Affairs; and the Director General of Authority for Research and Conservation of Cultural Heritages. Publicly accessible information on the Ethiopian Tourism Organisation (and the Tourism Transformation Council and Tourism Board) is scant, making it difficult to describe their activities and successes to date. Undergraduate research by Birhanu and Negussie (2015) provides a degree of insight into the newly established Ethiopian Tourism Organisation, the relationship of the organisation with stakeholders, its complex accountability to both the Ethiopian Tourism Board and Ministry of Culture and Tourism, and the challenges it is already facing.

From a stakeholder perspective, Birhanu and Negussie (2015: 16) found that the Ethiopian Tourism Organisation was making some progress in their collaboration efforts which included

collaboration in areas of destination and product development; promotion and marketing; capacity building; and information exchange.

The Ethiopian Tourism Organisation is tasked with organising and leading tourism stakeholders; conducting tourism destination development on an international level; and to market the destination. From a promotional and marketing perspective, Birhanu and Negussie (2015: 20) describe the organisation's participation in international trade fairs; exhibitions and road shows in certain countries; and producing marketing materials. Even so, the perception by participants in their research was that the organisation was poorly promoted amongst tourism stakeholders and the Ethiopian general public. The Ethiopian Tourism Organisation comprises three main departments, namely: the tourism destination and product development department; the tourism promotion and marketing department; and the administration department. It runs two information centres at Bole airport and Meskel Square in Addis Ababa.

While the Ethiopian Tourism Organisation was only established two years before the writing of this article, it has achieved some initial progress: regional tourist destinations had been assessed; in some regions, actual destination development had begun; quality promotional material had been developed; a standard website has been developed; and promotional activities (such as road shows) had been initiated.

Challenges that the Ethiopian Tourism Organisation face were described by Birhanu and Negussie (2015: 18) as the limited human resources of the organisation; lack of information and misconception of the mandate of the Ethiopian Tourism Organisation by stakeholders; overlap of jurisdiction and interest (although this overlap is not clarified); and overstated expectations (again this is not clarified by these authors). While it was recognised that the Ethiopian Tourism Organisation can transform the tourism sector, this would only be achieved if the "organisation manage(s) to solve internal structural, planning, financial and human resource constraints" (Birhanu and Negussie, 2015: 23).

Birhanu and Negussie (2015: 26 – 27) make a number of recommendations for the Ethiopian Tourism Organisation to support tourism transformation which include: further identification of tourism stakeholders and conduct stakeholder mapping; finalisation and implementation of a stakeholder coordination strategy; further diversification of areas of collaboration; further "prioritization of tourism sector among other primary sectors like agriculture and manufacturing"; promotion of its mandate to stakeholders and the general public; the establishment of an effective public relations function; solving its internal structural, planning, financial and human resource problems; and clarification of the Ministry of Culture and Tourism's role in the Ethiopian Tourism organisation. Birhanu and Negussie suggest that even at this stage of the organisations development, it may already require significant re-structuring.

Louw, E. recommends an organisation tasked with marketing a destination, such as the Ethiopian Tourism Organisation, "needs to be a public-private partnership... the private sector does not want to work with government all the time" (personal communication, 2016).

When questioned about the seemingly inability of the tourism industry to develop quickly, the anonymous participant (2016) was quick to point out that failure to do so was not the responsibility of just one organisation, and that the role of all stakeholders should be considered. Some of the institutional constraints experienced in the development of the sector were suggested as being the following: limited budget as finances depended heavily dependent on public rather than private financing; lack of strong collaboration with other governmental and private organisations; lack of clear policy and little incentive for private

investors; lack of technology especially to compete and market the tourism products online; lack of quality promotional material; lack of awareness about tourism starting from community level to the top; lack of destination conservation; and lack of diversification of tourism products.

The following perceived obstacles to tourism development were cited: lack of infrastructure near destination areas; lack of inter-regional marketing (within East Africa); strict visa policies; lack of effective capacity building programmes; and lack of a strategic implementation programme to action the tourism policy (anonymous: personal communication, 2016). This last point is emphasized in the authors' recommendations further in the article.

With regards to destination marketing of Addis Ababa itself, again it seems as though little is happening in this regard. A link on the Ministry of Culture and Tourism website to Addis Ababa Culture and Tourism Bureau (2016) yielded a non-functioning website – even though it provided the options of accessing the website in English or Amharic, neither of these portals worked.

Having discussed the Ethiopian tourism policy and institutions, it is worthwhile reflecting on some theory detailing best practices for tourism policy aimed at developing the tourism sector.

### **Appropriate tourism policy for Ethiopia**

The importance of a clear policy for the tourism sector is reflected in Dieke's (2003: 291) comments on the problems within Africa's tourist sector: "There are no clear strategies for development in general, or for tourism in particular, and tourism has not been integrated with other economic sectors... tourism development in some countries has been insufficient, in others it has been uncontrolled or excessive". Dieke (2003: 293) emphasizes throughout his writing that there is a need for political will to ensure the tourism sector develops to its potential.

For tourism development to succeed in an environment of minimal tourism infrastructure and lack of effective marketing, a tourism development policy is required that mobilises human, capital and physical resources (Dieke, 2003: 294). Furthermore, such a policy, according to Dieke, requires the identification of the tourism products; the organising of marketing; overall control of the sector; and integration of the sector into the national economy – failure to do so will inevitably mean such a policy is doomed for failure.

Ahjem and Font (1999: 74) further suggest that destinations have to determine what their strengths are in order to create differential strategies; adapt their products to what tourists want; and for emerging destinations to determine what their targeted tourists want and to satisfy them to the best of their ability. A tourist master plan, in Ahjem and Font's (1999: 75) view can only be developed by a controlling public body, although they stress participation by the public, private, and non-profit sectors, as well as residents themselves. The policy should maximise the net social benefit of development, which implies profit and societal benefit maximisation without environmental and social damage.

Dieke (2003: 294) suggests the following factors be taken into account when developing a tourism policy: Tourism development objectives be analysed in terms of national policy; sub-regional and regional considerations be integrated into national plans; analysis of systems of co-operation and exchanges; well-conceived and articulated realistic tourism policy objectives; local involvement and control in tourism development; developing private-public sector partnerships for tourism development; raising gender awareness to facilitate female participation; promoting regional tourism co-operation and integration; allocating suitable

resources; developing equity in tourism benefit sharing; promoting tourism awareness campaigns; providing a legal framework for tourism; destination marketing and promotional campaign; and expanding tourism entrepreneurial initiatives and investment opportunities.

A number of policy processes are described by Dredge and Jenkins (2007), one of which is policy-making as a cycle. Referring to Inskeep's tourism and policy cycle, Dredge and Jenkins (2007: 199) describe the different stages of a policy cycle as being study preparation; determination of objectives; survey; analysis and synthesis; policy and plan formulation; recommendations; and implementation and monitoring.

Addis Ababa could be a valuable starting point for tourism development, hence the necessity to explore theory regarding local destination planning and policy for cities. A number of local government roles and their influence on tourism are described by Dredge and Jenkins (2007: 306): infrastructure provision and maintenance; land use planning; environmental management; open space planning and management; public health and safety; local economic development; education, training and employment; tourism promotion and marketing; arts and cultural development; community development; and human services to improve service delivery. One aspect of local planning that is worthwhile considering is spatial destination planning that links tourists to attractions and the community. Dredge and Jenkins (2007: 321) refer to Gunn's destination concept comprising a number of elements in spatial planning. The *gateway* refers to the entry and exit to the destination region; the *community* that services and supports the destination region; *access routes* or linkage corridors that facilitate movement throughout the region; and *attraction complexes* that draw tourists to the region.

The above discussion suggests that a review of the tourism development policies and mechanisms currently in place in Ethiopia is imperative – failure to do so will severely restrict its ability to achieve success in the tourism sector.

## **Recommendations**

A number of policy and destination development recommendations are made that could facilitate a speedy orientation towards tourism development.

### **1. 'Political will'**

For there to be any success in tourism development, political will is imperative (Dieke, 2003). This is an intuitive concept, as without the commitment by Ethiopia's political leadership to tourism, tourism growth is unlikely to pick up any momentum.

The historical context of Ethiopia suggests that not many political and business leaders have had much experience in international travel. Interventions could include educational programmes on the benefits of tourism, and personal international travel, in order to encourage a supportive culture of travel and tourism by the country's leadership.

### **2. Developing a tourism strategy**

This journal article does not contemplate proposing a specific strategy for the development of tourism in Ethiopia. Rather it intends providing some guidelines that could be adopted when developing a tourism strategy for the country.

Jonker's (2004) research which culminated in the development of a strategic competitiveness model for South Africa as a tourism destination, serves as a useful construct in this regard. Jonker suggests that there are a number of destination success factors that need to be integrated in destination development and management. These are discussed below.

### **Learning and growth success factors**

From a learning and growth perspective, success factors are infrastructure development, people development, and systems development (Jonker, 2004: 345 – 346).

The lack of adequate infrastructure in Ethiopia has been described a number of times before, and severely limits the ability of tourism to flourish, and poor infrastructural resources negatively impact tourist satisfaction levels. Chinese investment infrastructure has alleviated some of these problems and continues to do so, yet these infrastructural projects have not been integrated from a tourism perspective.

The importance of having the correct skills and capacity in the Ethiopian Tourism Organisation and other tourism institutions cannot be underestimated. Some of these skills may be readily available, while others may need to be brought in from outside the country.

Some critical skills that are needed include electronic marketing and destination marketing. As most people search online for tourist destinations, it is critical to have someone with the technical skills, who understands how social media and search optimisation works.

From a destination marketing perspective, a person is needed with the personality and charisma to work with a wide range of tour operators and stakeholders. "You would need a local who knows the product because this is what they need to communicate. Negotiate with the (product owners), understand their culture, getting them to do it together. Once that is in place, you could get in country managers or reps... but this is budget dependant" (Louw, E., personal communication, 2016). Over time, in-country representatives could be employed to promote Ethiopia in countries earmarked in a targeted marketing strategy.

Louw mentioned one way in which to up-skill tourism product providers: "It might be worthwhile for Ethiopia to develop a manual for tourism products that explains how tourism works, rates, how to market yourself. They might not know how the industry works" (personal communication, 2016).

A focus on training small and medium enterprises as one aspect of poverty alleviation is advocated by Miles (2014: 4), specifically tourism enterprises in local communities, to equip them with marketing, operational and related skills in developing and managing their businesses. Especially in view of the level of theft experienced and general unkempt nature of cities and tourism products, a re-education process for local authorities and the general population could be useful. As Louw, D. explains, a re-education process will teach "why it is important to have tourism – look after tourists, keep them safe and give them information... make sure areas are clean and safe" (personal communication, 2016). Louw even suggests the appointment of 'tourism ambassadors' appointed by relevant municipalities that could be a source for job creation and would support the development of the tourism industry.

From a systems development view, Jonker (2004: 346) identified market research and intelligence, and use of the internet and technology as critical success factors. The is a view similarly held by experts in the industry. "If you are a new destination or just starting, you need

to do a product analysis first... create a database of all the products they have, for whichever are (they) are planning to promote. Identify one or two key attractions that will attract... develop the routes to and from those attractions. There needs to be transport, roads need to be accessible. Basic infrastructure needs to be in place to get people there” (Louw D., personal communication, 2016).

In terms of developing the database, Louw, D. reflects on personal experience that everything tourist related be GPS (Global Positioning System) plotted from “garages to churches to cemeteries to guest houses... you name it... from there we created our website with this online database... our database is live, we keep it updated” (personal communication, 2016).

It would also be valuable to determine why visitors are already visiting the country. A simple way to do this would be a survey of guests at the airport or staying in accommodation in the country.

### **Destination management processes success factors**

Six success factors are suggested by Jonker (2004: 346 – 348), namely destination organisation and coordination; product and market development; marketing; human resource management; strategic management; and responsible management. Some of these are discussed below.

The first success factor is detailed as destination organisation and coordination. For Ethiopia’s tourism policy to be translated into a successful tourist sector requires effective implementation. To achieve this, it is recommended that an Ethiopian tourist body be established, with the purpose of marketing the destination; developing and maintaining tourist products (attractions); coordinate infrastructural development; and coordinate the public, private, and community sectors within tourism. This coordinating body could fulfil the need for “people, ... initiatives, the private sector, and consultants (who) should network and work together” to make tourism grow within Ethiopia (Abera, personal communication, 2016).

As described previously, the Ethiopian Tourism Organisation (F.D.R.E. Ethiopian Tourism Organisation, 2016) does not seem to be achieving much in terms of tourism development. This body could be used as the tourist body described above, or a new body could be established to implement the tourism policy objectives.

The second success factor is product and market development. Louw, E. stresses the importance of offering a wider range of activities and the contribution this could have to small business development and job creation. Using the example of buying twenty canoes for one of the country’s lakes, Louw, E. explains such a small investment could contribute to the variety offered in a region and it is an “opportunity for people to start small businesses... getting the entrepreneurs to do it, give them the funding. Simple nice and easy activities – a nice add-on” (personal communication, 2016). Miles (2014: 3) is of a similar opinion, suggesting that the diversification of tourism products can both make the destination more competitive while contributing to poverty alleviation. One way of promoting a wider range of activities would be some form of a visitor’s pass that would make the visitor aware of the range of activities available to them.

The third success factor is marketing the destination. Possibly the first step would be to determine the target markets Ethiopia would like to capture. Louw, D. discusses how the product analysis will guide the decision on selecting suitable target markets. These products

can then be used to attract tour operators to the country. “One operator could be linked to 6000 travel agencies in a country. The travel agencies normally sell packages that the operators compile. So if you can get the international operators familiar and happy with your destination, then that’s a big market as it covers all the travel agencies” (Louw, D., personal communication, 2016).

In addition to tour operators, online exposure is critical. Online travel agencies, such as Expedia, are a valuable marketing resource.

Another good way to introduce people to a destination is through the initiation and support of conferences and events. “That is a good way to get people to your destination for the first time. If you expose your products to them when they are there, change their perceptions..., these are things that you can use to get more people to visit in the future” (Louw, D., personal communication, 2016). Other examples cited to leverage conferences were the development of a ‘spouse-package’ that encouraged spouses to travel with their partners to Ethiopia.

A concept that is increasingly being adopted is providing the opportunity for visitors to take photo’s – a self-serving marketing tool that destinations can use to create higher visibility for their destination. “Create opportunity for people who want to take photos. Content with product. Free marketing for your products. People like to go where they have seen other people go” (Louw, D., personal communication, 2016). Information on the destination needs to be readily available and clear, online as well as printed format. Not just on activities, but information that the tourist needs to make important decisions, such as the drinkability of the water, and whether they are allowed to take photos.

### **Customer perspective success factors**

The critical success factors that Jonker (2004: 342) depicts is the acquisition of tourists through the product offerings and image of the destination; satisfaction of the guests in terms of the quality of the service received and quality of their experience; and lastly, retention through developing the relationship with tourist and customer care.

Quality standards should be an important aspect to tourism development, even at the relatively early stage of tourism policy implementation. The poor quality standards in smaller hotels and restaurants of Ethiopia is a major concern according to Kidane-Mariam (2015: 8) who advocates that tourism development addresses the issue as a priority.

The importance of quality tourism services mentioned in Ethiopia’s Tourism Code of Ethics, is reiterated by Angileri in his discussion on star grading of hospitality tourism products (personal communication, 2016): “First thing is the tourist wants some form of quality assurance. The stars are worldwide recognised. Every country has their own star grading system. When you add stars to marketing or a website, it adds value to the establishment”.

In this regard, it is recommended that a tourism grading council be established under the auspices of the Tourism Board. The council would be responsible for star grading accommodation establishments, and would operate a complaints line for quality monitoring and problem identification should standards be compromised. Consideration could be made for star-grading other tourism related products. Angileri suggests that “My personal opinion is it would add great value to also include historical buildings..., tour operators, guides, activity providers, tourism offices – I would like to see more of that being included in the grading pool” (Angileri, personal communication, 2016).

### **Sustainable growth success factors**

Sustainable growth of the tourist industry are depicted in terms of social success indicators and economic success factors (Jonker, 2004: 342). The urgent economic necessity to develop the tourism industry in Ethiopia has been described in much detail previously in this article, but one key focus in the Ethiopian tourism strategy is strongly advocated, namely, a commitment to poverty alleviation.

In this regard, much of the Uganda Inclusive Tourism Program constructs developed by Miles (2014 and personal communication, 2016) could be suitable for application in the Ethiopian context. 'Pro-poor' policies use the following mechanisms to achieve poverty alleviation (Miles, 2014: 2): employment of the poor in tourism products; supply of goods and services by the poor or businesses employing the poor; sale of goods and provision of services by the poor through the informal sector; establishment of small and micro tourism businesses by the poor; redistribution of tax revenues resulting from tourism; voluntary donations and support by tourists; and investment in tourism infrastructure that also directly benefits the poor.

An additional consideration in terms of social success is accessibility. "Tourism is not just for able bodies. Wheelchair accessibility... not just wheelchair accessibility but accessible to those with physical challenges. There are a lot of things you need to implement. And it starts off at the airport when you arrive... train stations" (Angileri, personal communication, 2016).

### **3. Policy review with a focus on implementation**

Reflecting on Dieke (2003), Ahjem and Font (1999), and Dredge and Jenkins' (2007) guidelines mentioned earlier, clear policy development is a prerequisite to successful tourism development.

As with all policies, it is worthwhile evaluating them on a regular basis. This would also apply to the Tourism Development Policy of Ethiopia in order to determine whether the policy is still relevant and whether it could be improved. A critical aspect is to evaluate whether implementation detailed in the original policy has in actual fact taken place. Based on the current state of tourism in Ethiopia, it is likely that there will be a disparity between what the policy envisaged and what it achieved.

Three questions in the policy review are suggested: What were the intended outcomes? Were these outcomes achieved? If not, what were the reasons for their non-achievement? The answers to these questions should guide policy makers, in setting new strategies with specified outcome indicators (Dredge and Jenkins, 2007: 242 – 243).

It would be worthwhile utilising some of the policy processes incorporated in Inskeep's tourism and policy cycle (Dredge and Jenkins, 2007) described previously. Through this process a tourist master plan (Ahjem and Font, 1999: 75) could be developed and be encapsulated in the development policy.

Stakeholder participation and sustainable tourism development are important constructs for tourism policy, and the existing tourism development policy is commendable in this regard – the review should ensure this prioritisation in maintained. Referring to the Ethiopia's Tourism Code of Ethics (F.D.R.E. Tourism Code of Ethics: 2016), it is clear that that there is a focus on sustainable tourism, as evidenced by the ten principles encapsulated in the Tourism Code of Ethics.



#### **4. 'Ask a friend'**

To develop the tourism sector without outside assistance could delay the successful implementation of a tourism strategy. In this regard, Ethiopia could make use of a number of options to speed up the development of tourism through the use of consultants, partnering with international agencies, and encouraging international investment or assistance.

The lack of experience by political and business leaders in international travel, would intuitively suggest that Ethiopia could benefit from the use of specialised consultants with the necessary know-how to develop the tourism sector. It could also acquire assistance from international development agencies, such as the United Nations World Tourism Organization, to help them in their goal of developing the tourism sector.

Poor tourism infrastructure is one of the key obstacles to tourism development, which could be addressed by foreign investment or aid, one example of which is Chinese investment which is already having a positive impact on road infrastructure. Cheng comments: "The roads are a major challenge that is improving... some of the roads, like Gondor to Axum, are being actively improved by the Chinese, though the results won't be (seen) for another five years or so... Axum to Mekele is already done and travel time has been vastly cut" (personal communication, 2016). A similar view is held by Börjesson who suggests that the road infrastructure is generally poor, "but if there is any interest for the Chinese in the area the roads are super good in those areas" (personal communication, 2016).

Louw, E. (personal communication, 2016) also had an interesting suggestion of making strategic use of 'twin-cities' to promote the destination and form alliances internationally. This could aid in the promotion of not only Addis Ababa as a business and holiday destination, but also Ethiopia as a whole.

#### **5. Immediate destination development of Addis Ababa**

Addis Ababa is strategically positioned to leverage tourism for Ethiopia: a busy airport hub; numerous cultural, archaeological, historical, and religious attractions; home of the African Union headquarters and the United Nations Economic Commission for Africa; burgeoning transport infrastructure; and rampant construction of new hotels lends the city to tourism growth. Addis Ababa could be speedily developed as an immediate intervention in tourism development.

There is a notable lack of marketing; brochures and maps are almost impossible to find; security is a concern due to pick-pocketing; and it is difficult to get around the city due to the lack of information of transport options.

Spatial destination planning is a critical aspect to such growth as detailed previously. The *gateway* is clearly Addis Ababa's Bole airport; the *access routes* are poorly detailed, uncoordinated, unsafe, dirty and badly maintained; and *attraction complexes* are poorly maintained – as per Gunn's destination concepts (Dredge and Jenkins, 2007: 321). In order for Addis Ababa to develop its tourist potential, the access routes and attraction complexes need to be improved.

Access routes between the airport, accommodation establishments, and attractions need to be identified, cleaned-up, improved, maintained, better security mechanisms introduced; and information through signs and maps provided.

Attraction complexes, such as museums, markets and shopping centres need to be modernised and better maintained, with better access to information on these attractions through the provision of visitor's guides, maps, internet websites, and visitor's centres.

## Conclusions

This article has described the enormous potential tourism has for Ethiopia's growth and development, yet the country has failed to achieve much success in developing this potential. A number of recommendations were posed that could have a significant impact on tourism development. Probably the most important, is the 'political will' needed to drive the tourism agenda. Supported by a clear and achievable tourism strategy, the implementation of a suitable tourism policy, and an immediate prioritisation of destination development of Addis Ababa, tourism could be effectively developed.

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