



Challenges and opportunities of the tourism industry in Amhara Regional State: The World Heritage sites in focus

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Abstract

The tourism industry, being one of the key economic sectors, has to play a crucial role in bringing about sustainable development to Ethiopia. In spite of the fact that Ethiopia has a number of tourist attraction sites, it can be argued that the country has not yet obtained optimal benefit from the tourism sector. Thus, the research project in this article was an investigation into the challenges and opportunities of the tourism industry in Amhara National Regional State (ANRS) with the world heritage sites in focus. To address the objective, a mixed research approach was employed. To this end, both primary and secondary data were collected using focus group discussions (FGDs), semi-structured interviewd, self reported data and document analysis. Based on the thematic analyses made, this research found that the study areas have plenty of cultural, historical, ecotourism, archaeological and religious tourism resources. Moreover, the study has identified that the hospitality of the local community, the presence of internationally well known tourism sites nearby, and the presence of relative peace and stability are all major opportunities to boost the tourism development in the study area. On the other hand, the study revealed the following as major challenges for tourism development in the study areas: the bad image of the country, professional ethical problems among service providers, lack of intercultural communication competence, lack of adequate attention to the sector, weak promotion, direct and indirect violence against tourists occurring in different forms, a lack of coordination among stakeholders, insufficient quality of services, undeveloped tourist attractions, price discrimination, and a lack of sufficient and efficient manpower in the sector. The study determined that in the study areas, the opportunities to tourism development are very wide however a number of constraints have been observed from the discussion with government bodies as well as service providers in the study areas. The study concludes that the tourism industry performance is not satisfactory and largely underexploited due to the variety of challenges at different levels. Based on the findings of this study, the researchers recommend that each responsible stakeholder in the sector should be responsible in terms of taking immediate action and offering training particularly in the areas of cross/inter-cultural communication, developing professional codes of conduct and excellent customer service provision.

Keywords: Challenges, opportunities, stakeholders, World heritage sites, Ethiopia



Introduction

Tourism is an industry that operates by the movement of the peoples from place to place, for a given period of time and with varying reasons for the visit (WTO, 2002; Nicolaidis, 2015a). Tourism is the biggest and fastest growing industry in the world. Over the last few decades, several countries have adopted towards tourism as a means of promoting development and economic growth. The experiences of different countries like Namibia (Ashley, 2000), Tanzania (Muganda, 2009), Taiwan (Tao, 2006) revealed that tourism has played a great role by serving as an alternative livelihood strategy for local communities. According to the World Travel and Tourism Council (WTTC) (cited in Fayisa, 2007), tourism has grown to become the world's second largest industry, directly accounting for 3.8 percent of global GDP in 2011. Tourism also employs 74.2 million people worldwide or 2.8 percent of total world employed people use tourism as a means of livelihood.

Several studies showed that tourism has an overall positive economic impact and that stakeholders need to be involved from the outset (Telfer & Sharpley, 2008; Nicolaidis 2015a & 2015b; Bramwell & Sherman, 1999; Byrd, 2007). A few of these studies have used Computational General Equilibrium (CGE) modeling to simulate the impact of tourism in a country and have found tourism to have positive impacts on the economy, particularly in terms of increased real Gross domestic product (GDP), employment welfare and exports (McIntosh, 1995; Nicolaidis, 2015a; UNWTO, 2013). In Tanzania, Kweka (2004) as cited in Tourism development strategy (August 2006) used a CGE simulation to test several scenarios for tourism expansion and its possible impact on the economy. He found that tourism expansion has a substantial impact on the economy of Tanzania, as shown by increases in real GDP, total welfare and expert agreement. Based on his simulations, he found that infrastructure improvement appreciably amplified the effects of tourism expansion and tourism taxation and hence, it had a favorable impact on tax revenues and welfare. Kweka also pointed out that tourism has the following positive characteristics:

Tourism has assisted many developing countries to move away from dependency on agriculture and manufacturing. Relatively speaking, however, although tourism seems to be adding substantially to the economic growth of many of developing countries, these countries are not reaping the full benefits from tourism. According to the UNWTOS (cited in Teklehaymanot, 2011), in 2011, about 956 million tourists were registered all over the world; while, the African share was 30.8 million tourists amounting to a mere 4.7% of the total amount.

Ethiopia has been one of the tourist destinations in the world. Indeed, it has been endowed with a large number of historical, cultural, archaeological and eco-tourism sites. Although Ethiopia experienced an increasing international tourist inflow with a high arrival growth rate of 15.1% in 2002/3 to 23.5% in 2004/5, it still has the lowest tourist inflow and it is the lowest benefit recipient in Africa, with a share of only 0.58% arrivals in 2004 (Fayissa, 2007). According to the World Bank report (2004) one reason for continued poverty in Ethiopia is the over-dependence on the agricultural sector (Ayele, 2007). Hence, tourism is an option to significantly improve the livelihoods of both rural and urban communities, and it is one of the economies for unlocking the potential to provide meaningful benefits (World Bank, 2004).

As is the case, the Amhara National Regional State is the most prominent tourist destination in Ethiopia, boasting three world heritage sites. The socio-economic benefits of the local communities accruing from tourists, are highly dependent on the length of stay of the tourists at



the destinations. Although the number of tourists (domestic and foreign) is increasing from time to time, arguably, the revenue generated from the sector remains insignificant. Different studies showed that the length of stay of the tourists at the major tourist destinations in Amhara region is too short. Thus, according to the report released by the Amhara Region Culture and Tourism Bureau (2014), the average number of days spent by foreign/international tourists is 1.5 days, 3 days and 5 days for Fasil Castles (Gondar), Lalibela Rock-hewn Churches (Lalibela) and Simien Mountains National Park (Debarq) respectively. Such a situation, that is, the short duration of tourists' stay, therefore tends to imply that there is a gap in the quality of service delivered by the concerned stakeholders seemingly at the different levels. Therefore, identifying the major challenges and in the tourism industry is one of the major research themes, which therefore becomes the focus of attention in this limited study.

Objective of the study

The major aim of this research was to investigate the challenges and opportunities in the development of tourism development in Amhara Regional State - a World Heritage site in focus.

Specific Objectives

The research intended to achieve the following specific objectives:

- To examine the tourism potential / touristic value of the study areas.
- To assess the opportunities for the development of tourism industry in the study areas.
- To identify the major challenges to the development of the tourism industry in the study areas.

Materials and Methods

The very nature of this research topic and the research questions that were formulated from it dictates the type of the research design. This study employed of qualitative methodology and the research design of this study was cross-sectional. The qualitative approach to data collection was therefore used to address the research objectives.

Data Sources

This research was conducted by using a descriptive survey in which all data relevant to the case was gathered and analyzed. The research also used both primary and secondary information as sources of data. Participatory focus group discussions (FGD) and interviews were used as a primary sources of information for this study. The information of primary sources was also supported and triangulated by a document analysis of sources of secondary data gained from different reports, surveys, and academic peer –reviewed articles.

Target populations

The study was undertaken on purposively selected areas of Amhara region world heritage sites destination i.e. Debarq/Semien Mountains National Parks, Gondar/Fasil Ghiby and Lalibela rockhewn churches. These areas were selected purposively since they are assumed to have high tourism potential or due to thier profound significance in tourism development and opportunities for tourism growth. After identifying the target areas, the respondents were



selected by the researchers using a combination of both purposive (available) and volunteer (Accidental sampling) methods. A sample of respondents were identified by using purposive sampling because of their extensive knowledge, experience, expertise, linkages and involvement with the tourism sector in the study areas. In other words, they were selected based on their contribution to the sector and to the overall research objectives stated above. Thus, tourism offices both at woreda, zone and regional level, tourism guide associations, tourists, major hotels and restaurants workers (receptionists and managers), tourism information centers, tour operators, scouts and cooks, souvenir shops were purposively selected in the study areas.

Methods of data collection

To achieve the aims and objectives of this research, it is vital to have a comprehensive research approach. For this study, various techniques of data collection were employed to gather both primary and secondary data. To this end, the following instruments were developed by the researchers.

- **Focus group discussion (FGD):** There were three focus group discussions at each of three purposively selected areas and use was made of a semi-structured checklist.
- **Document Analysis:** Documents (like reports, minutes, surveys, newspapers, template, brochures, guidebooks and magazines) were used from both study areas tourism office at woreda and zone level.
- **Interviews:** This study employed a semi-structured interview in order to collect firsthand information from a number of relevant stakeholders in the tourism sector. In doing so, primary/qualitative data were gathered mainly from our target groups namely core process owners and experts of the ANRS Culture, Tourism and Parks Development Bureau, zonal and woreda culture and tourism offices of the heritage sites, as well as tour guides and tourists.

Methods of data analysis

The data was collected using FGD, field observations, and interviews were analyzed and discussed in the form of a qualitative thematic analysis. A qualitative method of analysis was used for the data collected from both observation, interviews and group discussions. Data obtained from the in-depth discussions was used to strengthen the overall understanding of the issue. Specifically, it is believed that these discussions have shed some light on the overall shape of the study. Moreover, in order to make the research observable, it was supported by different figures of heritage and maps with a range of explanations. Some facts and points were also assisted by the use of secondary sources such as the AJHTL which is a leading journal.

Finally based on the available information which was obtained from the analysis part, a conclusion and recommendation was made by taking into account the most important points related with objectives and problems of the study.



Results and discussions

Opportunities to develop tourism in the study areas

Different data gained from various sources acknowledged that Amhara region is more blessed with an abundance and diversify in tourism resources than any of the other regions. Three of the eight Ethiopian World Heritage Sites registered by UNESCO are found in this region. These are the SMNP, the rock hewn churches of Lalibela and the Castles of Gondar. Hence, due to these world heritage sites, the region is termed “The Heart of Ethiopian World Wonders” as it contains most of the attraction sites of the historical route. In addition to the historic and eco-touristic value, the study areas are endowed with the fascinating and colorful (Temqet/ Epiphany, Ledet/Christmas, Qedus Yohannes/New year, Shadey, etc.) celebrations and the outstanding beauty of mountains, rivers, lakes, waterfalls and other topographies that are breathtaking for visitors. They thus have natural, historical, educational, scientific and cultural values thereby attracting both domestic and international tourists with varied purposes such as religion, holiday/leisure, adventure, research etc. Besides the live resources (The resources which they have been exploiting), the selected study areas have huge tourism potential which is not exploited and obtaining needed touristic value. For example, the Simien Mountains National Park is potentially favorable for trekking by serving as a center for northern route. In the Simien, trekking can be exploited as a major product as it is endowed with attractive landscapes and live culture and history.

Adventure tourism is also another of type tourism worth tapping into. In Simien, there is a segment of tourism consisting of programmers and activities with a connotation of challenges, expeditions full of surprises, and these are most often for adults, involving daring journeys and some unexpected activities. This type of tourism caters for those who want to do more than just visit regular tourist sites. Another type of tourism which could be exploited is professional tourism. In the Simien, a type of tourism that allows professionals to have direct contact on site with the fields in which they are involved, and where they can increase or exchange knowledge with other professionals could be exploited. Examples of this abound in Agriculture, Anthropology, Botany, and others as well.

Moreover, agri-tourism, rural tourism, and sport tourism, could be also used as valuable tourism resources. In Gondar and Lalibela, in addition to the actual sites, there are huge tourism resources which are not utilized yet. To mention some, these include a traditional Church School visit, an open air market visit, an urban tour, cultural tourism, medical tourism (religious medicine) and museum tourism. All of these are the major resources, which have not been used in the areas. Besides this (maybe one of the reasons for low tourist stays), the huge historical, cultural, natural and archeological tourism resources around Gondar and Lalibela are not fully exploited. In addition to the aforementioned tourism resources, the following helps the development of the sector in the study areas. The presence of a conducive climate, the presence of relative peace and stability, the friendliness and openness of citizens, the presence of culture and tourism in the sector at both regional, zonal and woreda levels, and the presence of internationally well known tourism sites nearby.

The data obtained from FGD and documents have revealed that the tourism sector has become a major source of income for various stakeholders engaged in the sector. In this regard, despite the fact that region is endowed with various natural and manmade heritage, it has not benefited much from the sector for years due to various factors.



Major challenges to the development of tourism sector in the study areas

For the underdevelopment of the tourism sector in the study areas, problems which have been occurring at both the local and national levels are responsible for these. The data obtained from FGD discussions, in depth interviews and secondary sources have verified the following problems which exist in a variety of degrees in all the study areas and which serve as a severe bottleneck for tourism development initiatives.

Bad image of the country

The positive image of the country is less known in the tourist generating countries due to the unbalanced media information. The country has been singled out as a country of instability, war, drought and famine. For many people around the world, mentioning Ethiopia brings to mind its devastating 1984 famine. This image hurts the growth of its fledgling tourism industry and negatively affects the desired inflow of inbound tourists to the country.

Little attention to the sector: The attention given to the sector is minimal, be it in budgets or in man-power provision. It is considered to be a tertiary sector and thus less important. There is a strong belief that “food security” or “sustainable development” could be achieved only through agriculture. Although the importance of agriculture is undeniable, diversifying the economy with every possible means could be more important to change the lifestyle of the society and generate jobs.

Weak promotion: Marketing, promotion as well as customer handling practices remain far from the standard. In the destinations, FGD results have confirmed that both the federal, regional and local culture, the Tourism and Parks Development Office is not effectively promoting the tourism resources to the different world tourists. The real image as well as the historical, cultural and natural heritages is not introduced broadly enough.

Lack of coordination among stakeholders: There is a lack of coordination among different tourism stakeholders. Tourism activities are highly inter-dependent and all stakeholders need to be engaged as stated in articles by Nicolaidis (2015a; 2015b).

Lack of professional ethics among some tourism service providers: Different sources have revealed that significant numbers of tourist service providers are misbehaving and violating the principles and ethics of the tourism code of conduct, especially guides and tour operators who are often unscrupulous.

Undeveloped tourist attraction: Many tourist attractions in Amhara region including the study areas are not very well developed yet. Proper development usually involves considering factors to make sites more amenable to foreign visitors, including educational and explanatory signposts and walking paths, as well as aesthetic considerations such as proper placement of museum exhibits and historic artifacts.

Less involvement and participation of local communities: The findings have revealed that local communities in the study areas have very limited participation and involvement in the tourism industry. The major reasons which are responsible for this are: Lack of knowledge and awareness on how to use tourism resources, absence of technical and financial support from the concerned bodies, absence of creating a conducive atmosphere for local communities to be part of decision-making, poor policy drafting and other tourism related activities.



Absence of diversified tourism services: It is well-known that the tourism activities encompass multi-variant natures and types. In the destinations, there are no diversified tourism activities other than visiting the world heritage sites. This in return limits the tourist stay-over in the areas concerned.

High cost of services: Costs of the tourist services in Ethiopia/international aircraft prices, accommodation and car hire services are relatively high compared with most neighbouring countries and in effect they have is to make the country an expensive destination to visit. In regard to accommodation, although data is not available on the price of hotels in the neighboring countries, some figures from the ANRS Tourism, Cultural and Parks Development Bureau indicate that these are too expensive. Even a small car rental is exorbitantly high.

Poor standard of hotel services

According to the information obtained from the tourism experts of Amhara National Regional State Bureau of Culture and Tourism, tourist standard hotels are relatively high-class accommodations that are frequently used by mainly foreign tourists. However, social-class foreign tourists, who are usually called backpackers, tend to prefer to use the mid-range hotels. On the basis of the opinions gained from the working experience of tourist standard hotels' managers the existing supply of accommodation services in the major destination mainly in Gondar, Bahir dar and Lalibela is not comparable with the ever-increasing demand of international tourists. They further expressed their fear that seasonality is another major problem in the rate of occupancy of the accommodations. Thus, in the peak /high/foreign tourist seasons mainly from December to February there is a better occupancy rate when compared to the low season of the other months. The concerned tourism professionals of the Bureau also shared their ideas. Particularly since Bahir Dar is the seat of the Regional Government, there are frequent conferences to held there. In light of these and the increasing tourist inflow the existing accommodations are not considered to be enough both quantitatively and qualitatively. Particularly in terms of quality there seems to exist some crucial problems such as poor sanitation in both tourist standard and mid-range hotels.

Another basic problem that needs mentioning is the lack of the appropriate trained and skilled human resources. According to a survey study conducted by Amhara National Regional State Bureau of Culture and Tourism in 2010 the profile of employees in the five surveyed hotels showed that out of the total 448 employees, only 62 or 13.2% had received any formal training. From amongst these 62 trained employees, only 12 had a diploma level training while the rest received only a certificate level of training. Only four of the standard hotels have managers who have studies and obtained Bachelor degree in either tourism or hotel management. The lack of standard training and educational institutions has contributed to a huge lack of trained human resources. Meanwhile, in recent times it is well known that the government Universities of Addis Ababa, Gondar and Hawassa, and other private tourism institutions throughout the country have started offering courses on tourism and hospitality and these now range from a certificate to the postgraduate Master of Arts level.

The Amhara National Regional State Bureau of Culture and Tourism underlines that the existing manpower in the accommodation facilities and services of the town are not adequate both quantitatively and qualitatively as they are expected to be by the tourism sector because of the following prevalent problems. Almost all of the accommodation sectors are owned privately the employees are usually assigned by the owners of the businesses themselves and as a result



whoever he/she is, anybody can become part of the staff of a given institution and some could even be given a managerial status way beyond their capabilities, let alone working in the different jobs levels in the various departments in hotels. The absence of standard rates, the application of standard regulations and lack of serious regular inspection of the tourist accommodation facilities and services by the concerned Federal, Regional and City Administration tourism government bodies add their own contribution for the problem. This is where codes of conduct are needed to guide behavior (Nicolaidis, 2016). As a result those who have proper training in tourism and hospitality and who could fit well into their profession are still jobless and looking for vacancies. The last but not the least problem related to the manpower of the accommodation sector is the undermined cultural attitude of the people towards working in the hotel sector as a professional. Society appears to frown upon this vocation.

Water Transport

The oldest and historical monasteries with immense heritage are found in and around Lake Tana. Water transport is also used to cross the Blue Nile River in the vicinity of the Tis Abay Falls. All these attractions are easily accessed from the town of Bahir Dar. The town of Bahir Dar in other words serves as a gateway to these aforementioned tourist sites. At present time there are around 31 privately owned boats operating in Lake Tana. The boats are both licensed and not, provide round trip transport services that ranges from five hours to one hour depending on the distance and number of monasteries to be visited. The business of these boats is very much dependent on tourists since local people do not use these boats that much. According to the tourism experts of Amhara National Regional State Bureau of Culture and Tourism, the number of boats is enough to accommodate the demands of visitors and allowing many boats to float on the lake has its own repercussions mainly by emitting gas and oil and thus creating water pollution issues. The experts further explained that most of the tourist boats have several problems when it comes to providing safe and efficient services to the tourists. Some of the problems are stated as follows:

Boat captains lack proper skill and knowledge of boat operation/sailing

1. Boats are not equipped with proper and reliable communication means and safety equipment such as life jackets, compasses, or even radios. In fact, they have no compass at all; they sail to any direction based on intuitive judgment and experience. The life jackets they provide visitors with are of a very poor quality and as well disgustingly dirty to wear.
2. The cost of transportation asked by the boat renters is relatively high. For instance for a short distance round trip that could take 1-2 hours the average payment per person is 300.00 birr. As the distance/time increases so does the cost of transportation. Thus, this too costly transportation condition particularly affects the movement of domestic tourists. As a result tourists tend to hesitate to arrange and make long trips or journeys to the far distant tourist sites of the Lake. Besides, it is common to observe the restless approach of the so-called boat-brokers during their bargaining at the Lake shores ultimately affecting the atmosphere of peace to the extent that the menacing presence is being adversely sensed by visitors.
3. Boat captains have reported that they have a number of problems that include lack of appropriate engine maintenance skills and a lack of spare parts. Another pressing problem is the lack of standard docking place on Lake Tana from where they can operate and particularly during winter time, when the level of the lake decreases in



volume there are no suitable docking places. Generally speaking, almost all of the bodies of the boats are made locally with the few exceptions that some have imported these from abroad. Though the producing of bodies of the boats at local levels is a promising industry and one that could help transform the trade, the issue of quality still remains.

4. The Lake Tana Maritime Transport office is a government institution that provides alternative transport services for the population residing on the peninsula and on the islands of Lake Tana. It also provides services to tourists and the office has 11 boats out of which three are for tourists. The office has been given legal authority to own, rent and regulate all the docks on the lake. However, an informant stated, it has failed to exercise its authorities due to mainly a lack of strong coordination and support from various concerned stakeholders. The office has tried to communicate and work together with concerned government offices such as Trade and Transport, Culture and Tourism, Police , etc., in order to promote a standardized and secure water transport to domestic and international visitors, but efforts seem to be fruitless. As a result unprofessional and unsafe boat trips are rampant or a potential threat for the development of tourism on and around Lake Tana where the town of Bahir Dar lies.

Poor standard tourist Information centers

Tourists need clear information and facts about attractions and services. According to the evaluation of the Amhara National Regional State Bureau of Culture and Tourism, unfortunately, none of the local tour guides has enough information and knowledge about what they explain nor are there well organized tourist information centers at the attractions. The impression of a destination starts from the place and means of providing the necessary basic information i.e., a professional tourist information centre and tourist information materials. The tourist information centers are not organized in such a way that they could efficiently and effectively serve visitors information needs. The centers are also shoddy and very untidy and managed by a single person who works during government working hours only. The information provision materials that are the flyers are made from, are very low quality (paper and the ink) to be used by international visitors who are used to a better quality material and information.

Conclusions

The study areas have plenty of cultural, historical, archeological and eco-tourist resources. The study concludes that in the study areas, the opportunities for tourism development are indeed very wide. This huge tourism potential of the area has a great potential to contribute to the local communities of the study area in creating incomes, job and investment opportunities. But a number of constraints have been observed that serve as a bottleneck for the sustainable development of the sector as understood from the discussion with government bodies as well as service providers in the study areas. To mention some, there is a lack of coordination among stakeholders, a bad image, weak promotion, the absence of a well-organized tourism policy implementation framework, underdevelopment of the tourist attractions, little attention to the sector, a lack of professional ethics among some service providers, the poor quality of service and less involvement of local communities in the sector are some of the deep rooted problems in this sector.



Recommendations

Based on the major findings of the study, the researchers have the following recommendations:

Well-organized and effective promotion: Marketing, promotion as well as customer handling practices remain far from the standard. The improvement of image building and other promotional activities requires large sums of money but budget constraint is still an acute problem. Thus, the concerned body should give due attention to the sector by allocation enough budget for the needed promotional activity to change the bad image of the country via international media.

Create a conducive atmosphere for local communities to be involved and participate in tourism: The issue of tourism is not an issue of a certain governmental institutions or individuals only. It is mainly the responsibility of the local communities. Therefore, a concerned governmental body has to devise a mechanism to make the community participate in the planning and implementation process of certain projects from the start.

A well-organized and coordinated tourism stakeholder is required: To make the local communities benefit more, the involvement of multi-sectoral stakeholders is crucial. There should be an organized, clear limit and formal relationship among the various stakeholders of tourism.

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